Sage SalesLogix | White Paper

Mobile CRM

Harness the Competitive Advantage of Your
Mobile Workforce through Sage SalesLogix Mobile

sage

Table of Contents

Executive Summary

Workforce mobilization has become a key competitive requirement for most organizations seeking to create greater intimacy and presence with customers. However, enabling mobility is more than just providing laptops and mobile phones to users and sending them out into the field. It's about selecting the appropriate technologies and developing the right user experience so users can be productive and take advantage of this new work paradigm. This is why extending key business applications like CRM to increasingly ubiquitous smartphone environments, like BlackBerry and Windows Mobile devices, has become critical to successfully tapping into your mobile workforce.

This whitepaper will walk you through the emerging mobile CRM landscape to help you better understand the benefits you'll reap from deploying a mobile CRM solution, as well as the key requirements you'll need to consider to successfully move forward with your mobile CRM initiative.

Introduction

While users have been able to access basic contact details on devices for some time, truly mobile CRM is a new frontier that holds great potential to significantly transform the way mobile users can connect to and interact with business-critical information—driving revenues, productivity, and customer satisfaction. Today's front-line, mobile field professionals are finding themselves in everyday situations that require an extended CRM environment that works the way they do, when they need it. As part of its progressive Anywhere Workforce Experience strategy[1], Sage recognizes the importance of taking CRM "mobile" and providing its customers with a comprehensive set of native Sage-owned and supported tools and technologies.

Now that desktop CRM has established itself and proven its value in most business environments, IT departments are now being tasked to extend CRM to a mobile workforce who is rapidly growing accustomed to smartphone devices that are always-on and allow them to always be connected.

1 Sage CRM Solutions 2010 Strategy, March 2008

What is "Mobile CRM"?

Mobile CRM is about taking advantage of the latest smartphone technologies to introduce CRM into key customer situations where notepads, napkins, or human memory currently dominate. These are situations where laptops either stay in their bag or are even left back at the office—situations where information exchange is still needed, but not always effectively retrieved or captured.

For the most part, the goals of "mobile" CRM are not fundamentally different from "desktop" CRM. After all, CRM is about better understanding and servicing customers' needs to drive revenue, satisfaction, and loyalty. Mobile CRM is about leveraging the unique advantages enabled by mobile technologies to help realize organizational goals, even when employees are on the go.

While mobile CRM has traditionally been addressed by outfitting users with laptops, today's mobile CRM extends the computing environment even further to the latest in smartphone devices that optimally integrate voice, e-mail, and other data services in a hand-held form factor.

Unique Advantages of Smartphones for Mobile CRM

While laptops will always play a critical role in the mobile toolset, smartphones introduce some unique advantages ideally suited for mobile professionals, especially for CRM. These advantages, as measured against traditional laptop computing, are:

- **Form factor** – Smartphones are far less obtrusive than laptops—ideally suited for tightly-packed airline seats, taxis, or subways. They are often used for premeeting research before customer engagements and they ensure that data is always available and accessible and not confined to those situations where it's "convenient" to use—it's always convenient.

- **Immediacy** – Real-time information access and capture requires a device that is ready on touch. Smartphones are specifically designed to be highly responsive and available. This ensures that valuable customer data and opportunities are always captured.

- **Discreetness** – For capturing or referencing timely data, it's not always practical, convenient, or even appropriate to pull out a laptop during a face-to-face conversation. Smartphones provide a level of discreetness that doesn'tdisrupt business flow or conversations when being accessed to retrieve or input information.

These important characteristics of today's smartphones are what make them candidates to take CRM "mobile." By providing CRM users with the information they need, when they need it, without complexity or obtrusiveness, smartphones equipped with CRM data and functionality can provide significant value to a mobile workforce.

"Mobile CRM is about leverageing the unique advantages enabled by mobile technologies to help realize organizational goals"

Key Business Challenges Addressed by Mobile CRM

Mobile CRM is not just an enabler to improve business processes for field professionals, but it also solves an important business challenge faced by many organizations when it comes to CRM, namely, how to improve CRM usage rates among mobile users and turn CRM into a competitive advantage in the field.

A common observation among companies using a CRM solution is that the field staff often appears to be disengaged from the CRM process. In many cases, mobile processes still appear to be mostly manual and note-driven, with information not being effectively captured into the system. Leveraging the benefits of a CRM solution requires ubiquitous availability of computing resources and connectivity to the CRM database. In many, if not most mobile situations today—either at a customer site or in-transit—the benefits are lost without the right mobility tools, including mobile CRM.

Easy mobile access to CRM means that more information is captured and stored immediately through a smartphone device and transparently synchronized with the CRM system so it can be immediately accessed by all members of the sales, support, and management teams. Similarly, as internal users engage on a customer issue and update the CRM system internally, critical updates can be synchronized with mobile users, in real-time.

Clearly, the mobile field professional is a vital link in the fluid customer relationship chain whose full potential cannot be utilized to drive greater customer satisfaction and revenue with the absence of a mobile CRM solution.

Business Benefits of Mobile CRM

In addition to solving unique business challenges, Mobile CRM offers unique benefits for the organization because it:

- Integrates the mobile user into the core processes and procedures established as part of the CRM initiative by allowing them to work the way their business environment requires. This makes it easy for mobile users to utilize a CRM system that empowers them and translates into increased effectiveness and greater job satisfaction.

- Improves the quality and timeliness of the customer data added to the CRM system. Making iteasier for mobile users to input data means more data will be added to the customer record, and therefore data will be more timely, accurate, and complete.

- Streamlines and even accelerates sales or service processes as information can be immediately retrieved or requested. It also improves the mobile user's ability for on-the-spot problem solving. Many to-dos and follow-up action items that used to be done offline can be eliminated as problem resolution can be initiated in real time.

- Increases customer satisfaction through greater responsiveness from the field professional and customer service and support, especially through streamlining urgent questions and requests onto the appropriate parties.

- Increases revenue for field sales teams by moving opportunities through the pipeline more efficiently. And, these greater efficiencies and productivity mean that the mobile sales professional has the flexibility to visit more clients and close more deals, sooner.

7 Key Considerations for Your Mobile CRM Solution

What do you need to consider when adopting a mobile CRM solution? It's important to recognize upfront that mobile CRM is more than just another CRM client. The mobile environment itself can be complex and unique requirements should be considered when extending CRM to mobile devices. Sage recommends the following: The Sage SalesLogix product suite supports users in the environments in which they find themselves, recognizing that today's CRM environments are comprised of different client interfaces and requirements, both on and outside the network.

1. **Deliver a rich, familiar user experience** – Optimizing the CRM experience for mobile users requires a rich, familiar smartphone CRM client that maintains the look and feel of the desktop CRM application, while functioning as a native device application, sharing the familiar controls and navigation of the device. This approach serves to both dramatically shorten the learning curve, as well as increase user adoption and productivity.

2. **Support on-device and subscribed data retrieva**l – CRM information should be available locally on the device so users have immediate access to key information at all times, regardless of available mobile bandwidth. In addition to accessing local data, users should have the ability to remotely retrieve or "subscribe" to account and contact data sets, and corresponding updates as needed.

3. **Embrace customization** – Organizations routinely customize their CRM solution to match the way their business works. Therefore, the mobile CRM application should be fully customizable to reflect relevant changes made to the core CRM application on the network, or tailored to respond to specific mobile user requirements over time. In some cases, this may be just a matter of modifying existing entities to better align mobile processes with customized internal ones, or it may involve optimizing the mobile experience itself by improving the way that data is collected in the field and presented to mobile users.

4. **Closely examine security options** – Security is clearly a key consideration especially as network-housed information will now be extended to and stored on mobile devices. For both data at-rest on the device and in-transit during synchronization, a secure channel needs to be provided. In addition, a valuable requirement for always-connected devices like the BlackBerry is "data kill". This is particularly useful if the device is no longer in the organization (e.g., an employee is terminated or resigns) because the data can be deleted remotely without user intervention.

5. **Allow for incremental updating** – Synchronizing large volumes of data over-the-air can be time consuming and costly, depending on data plans, so compressed, incremental updates are an important requirement for both CRM data and application updates. In addition to costs, user patience can be severely tested if they're required to reinstall and synchronize full data sets with every customization upgrade or if downloading data takes an unacceptable period of time. Automated update delivery, often referred to as auto- or real-time synchronization, is also an important criterion which will make the experience more seamless for the mobile user.

6. **Offer broad device support** – While standardization on a specific hardware device or operating system is the goal in many IT initiatives, it can be difficult to achieve in the mobile realm due to individual or departmental user device and data plan preferences. Even if the option to standardize is still open, another challenge is that different devices will appeal to different users based on their role (e.g. executives vs. field service vs. field sales), the device's navigation controls, the keyboard layout, or even the tech savvy factor. So, picking a single popular device to satisfy everyone is not always achievable.

As a result, a mobile CRM solution should offer broad support for today's leading mobile devices, including BlackBerry, Windows Mobile Smartphone, and Pocket PC, and keep pace with supporting their respective operating system versions.

7. **Support single, mixed device infrastructure** – Your mobile CRM platform should be capable of supporting a broad mix of smartphone operating systems and versions, both for data updating, but also in terms of flexible customizations. A centralized administration infrastructure allows IT to easily assign users to the appropriate device client required by their role and device preference. In addition, a single point of management means that the number of servers and applications requiring support can also be reduced.

These recommendations should form the baseline set of criteria when considering or evaluating a mobile CRM solution.

Introducing Sage SalesLogix Mobile

Sage SalesLogix Mobile extends and enhances your Sage SalesLogix implementation to both BlackBerry and Windows Mobile devices, enabling employees to stay productive and effective while mobile. SalesLogix Mobile mirrors the familiar Sage SalesLogix interface and enables Account, Contact, Opportunity, and Ticket management from the device so users always have access to, and can easily update the latest customer information, whether in the office or on the road.


Figure 1

Introducing Sage SalesLogix Mobile Sage SalesLogix Mobile extends and enhances your Sage SalesLogix implementation to both BlackBerry and Windows Mobile devices, enabling employees to stay productive and effective while mobile. SalesLogix Mobile mirrors the familiar Sage SalesLogix interface and enables Account, Contact, Opportunity, and Ticket management from the device so users always have access to, and can easily update the latest customer information, whether in the office or on the road. The Sage SalesLogix product suite supports users in the environments in which they find themselves, recognizing that today's CRM environments are comprised of different client interfaces and requirements, both on and outside the network.

SalesLogix Mobile is a Sage-owned and supported mobile CRM solution that provides tight integration and interoperability with Sage SalesLogix, coupled with seamless support for mobile users. SalesLogix Mobile also provides peace-of-mind broad device coverage with full native support for popular Windows Mobile Smartphone and Pocket PC, both Standard and Professional Editions, as well as virtually any BlackBerry device all of which encompass most mobile devices shipping today. As new versions and devices are released, Sage offers certification on or shortly after public availability of shipping devices running the newest operating system.

Figure 1 : Sage SalesLogix Mobile Family
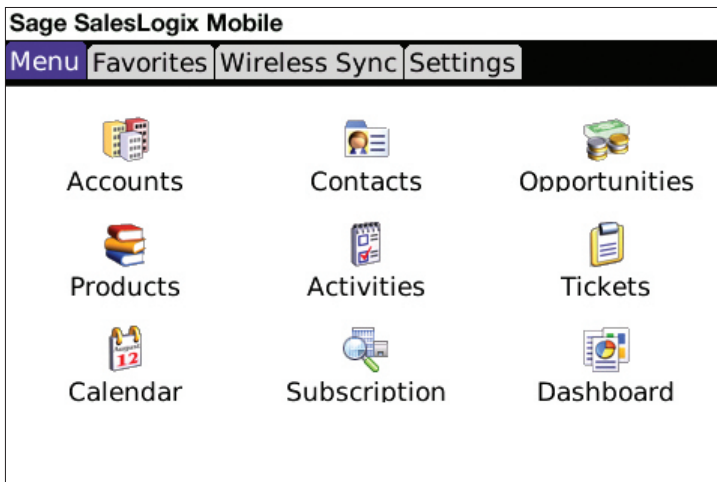
Bringing Sage SalesLogix to the Small Screen

With SalesLogix Mobile, the goal is to enable users to comfortably interact with the same network CRM data on the road and in a similar fashion, as they would in the office. One key design strategy of SalesLogix Mobile was to address the need to a) work the way mobile users do, and b) minimize the learning curve for mobile users already familiar with Sage SalesLogix.
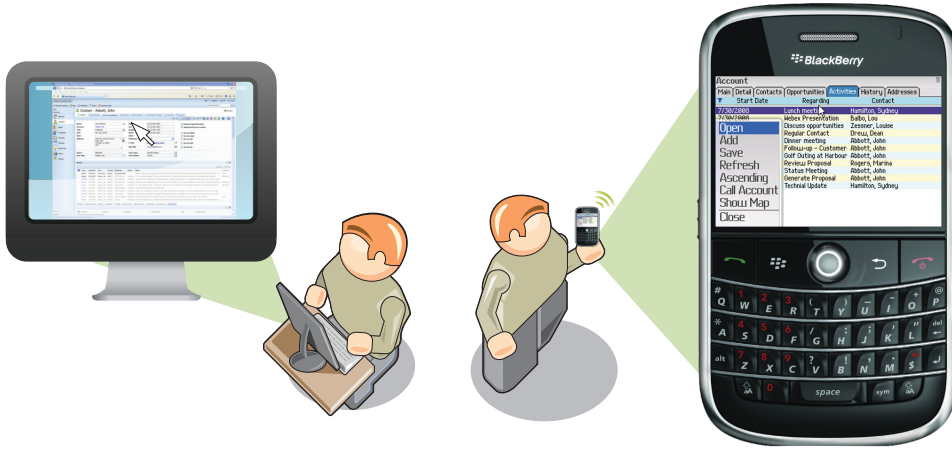

Screen real estate is significantly different between desktop and mobile environments so it's not practical, or even possible, to simply reproduce a full-size desktop application on a 2" x 3" screen. However, it is critical to maintain familiarity and reproduce key CRM functionality in the mobile environment to ensure immediate, high user productivity without requiring extensive re-training. One of the key strengths of SalesLogix Mobile is that it was developed by Sage to be a fully integrated part of the Sage SalesLogix platform, with a focus on creating the right mobile experience for Sage SalesLogix users.

In the following SalesLogix Mobile application screen shot, you can see the familiar Sage SalesLogix entities, such as Account, Contacts, Opportunities, Products, Activities, Tickets, etc., as part of the default or "out-of-the-box" mobile user experience.

"...the goal is to enable users to comfortably interact with the same network CRM data on the road and in a similar fashion, as they would in the office."

Each entity allows the user to drill into the most appropriate view to quickly look up information, check status, or add information to the customer profile. In addition, each entity represents a view of the data, but with easy access to other related details. Below you will see from the Accounts view, the user can simply access other tabs containing relevant opportunities, upcoming activities, history, and more for a complete view of customer details.
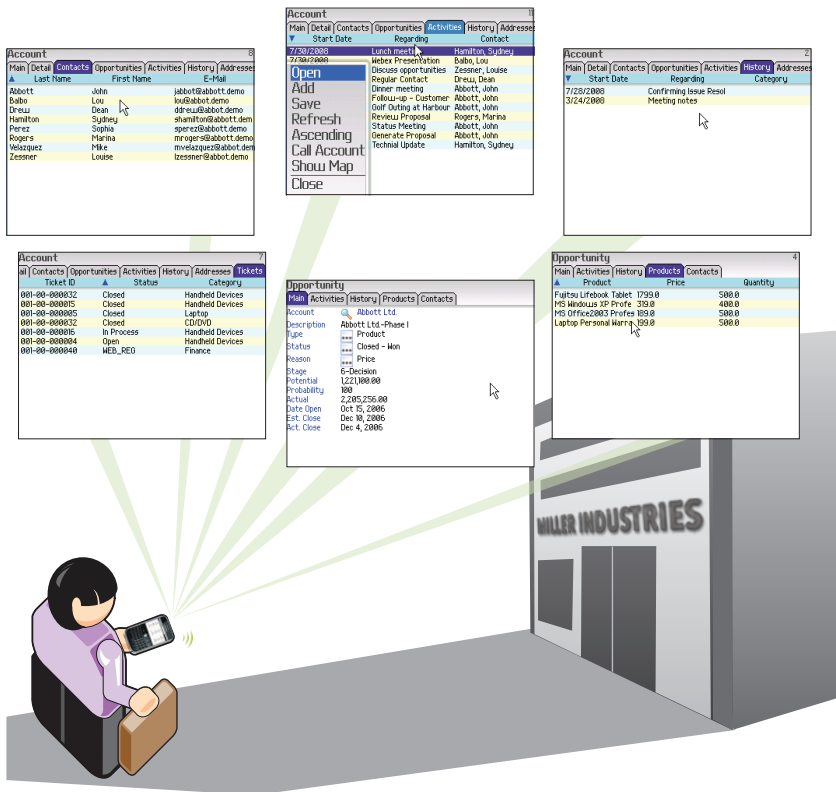

SalesLogix Mobile is tightly integrated into the host mobile environment so that users can make calls or send e-mails directly from a Contact or Account through the SalesLogix Mobile record. Also, for faster and more accurate data entry and prevention of duplicate entries, users can conduct Account and Contact lookups when creating a new record, and use Picklists to select from a pre-defined Sage SalesLogix list.

The SalesLogix Mobile clients are built with a "rich" native client architecture, meaning that applications for each platform are written in the native language of the smartphone operating system supported (Java for BlackBerry and .NET for Windows Mobile). This allows Sage to create the richest experience possible for the user, i.e. looking and functioning like a native application on the respective smartphone device, while at the same time maintaining a rich Sage SalesLogix experience. For example, smartphones are menu driven by activating selections with either a rollerball or side dial click. The menu functionality for SalesLogix Mobile is built the exact same way, enabling users to select menu options in the same fashion as the device. As a result, users benefit from a "learn-once" experience—quickly learning and adapting to the new program because it works the way they expect, both as a CRM and smartphone application.

Enabling Information at Your Fingertips—Anytime, Anywhere

A key requirement in maximizing the mobile user experience is the ability to quickly access data, whether online or offline. SalesLogix Mobile allows large sets of CRM data to be stored locally on the device, allowing users to add, edit, and interact on the go. If a user is in a meeting, at an airport, on an airplane, or in a customer's lobby, they are able to perform functions like adding notes, looking up prices, searching support ticket history, or updating status, without being forced to connect and reconnect through the process.
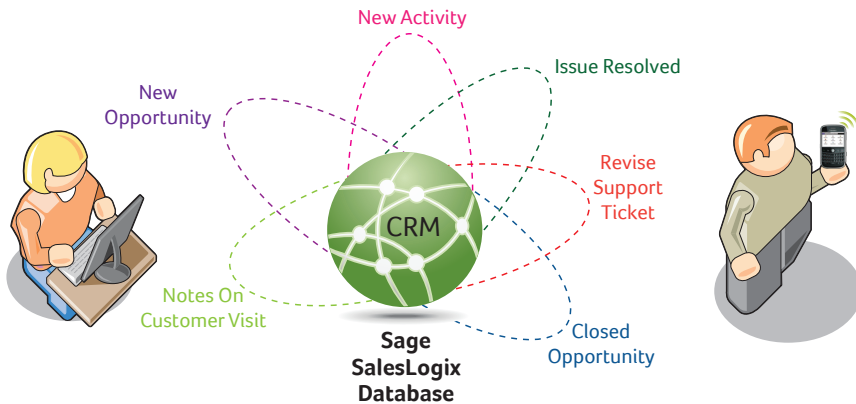
The desire for large amounts of data is largely driven by fear of the unknown, i.e., 'what data might I need when I'm on the road?'. To alleviate the need to take along too much data and overtax the device, SalesLogix Mobile also offers on-demand Subscriptions that allow users to remotely "subscribe and retrieve" additional account or contact data sets remotely. Ad-hoc or on-demand Account and Contact retrieval acts as a safety net for users should they become separated from the data they urgently need while on the road. Any updates to subscribed Accounts or Contacts will be synchronized, along with the core set of CRM data.

Works the Way You Do

The core of Sage SalesLogix provides the ability to deeply customize the CRM solution to meet an organization's unique business needs. This same consideration is extended to SalesLogix Mobile by sharing the same customization environment; thus taking advantage of efficiencies with reusable knowledge and requirements.

In addition to providing a very rich "out-of-the-box" or default user experience, SalesLogix Mobile also provides a robust set of development tools to further tailor the application to meet the role and needs of the target user. SalesLogix Mobile Architect is a unified Visual Studio-like environment used to customize both Windows Mobile and BlackBerry client applications. It supports both a complete Java and .NET coding environment, as well as "codeless" customizations, such as the ability to modify the application, change language, terminology, display order, etc., without requiring working knowledge of the respective coding languages.

The default SalesLogix Mobile clients are a set of pre-packaged customizations themselves, so mobile developers can simply take an existing client, clone or copy it, and make the appropriate changes prior to deploying to a mobile user or group of mobile users seamlessly. Furthermore, baseline clients can be created or augmented that represent company-specific terminology, process flow, and business logic, then reused (cloned) to further tailor the experience to the needs of the job or departmental function. Depending on user or group needs, multiple clients can be created and maintained in the Mobile Architect and deployed through the Mobile Administrator to target systems.

Securing Your Customer Information

SalesLogix Mobile supports the security services provided by mobile device vendors (RIM and Microsoft) to ensure data is securely transferred and stored on the device. Since communications and data transfer is provided through HTTP or Web services, all communications are secured using HTTPS. Optionally, stronger encryption is supported and can be used, if required.

SalesLogix Mobile not only leverages the secure transport layer and infrastructure provided by the respective mobile device environment vendors, i.e., RIM and Microsoft, but also provides password protection of the application itself.

In the case of BlackBerry, if a device is lost or stolen, or belongs to an employee who is no longer with the company, the administrator can delete the data on the device through a remote "kill" command, without impacting the device itself. This is especially important where the employee owns the actual smartphone, and "killing" the device is not an option.

Delivering Low Impact, Incremental Updates

SalesLogix Mobile supports incremental updates ensuring users always have the most up-to-date information with minimal involvement from IT. Incremental updating and compression is used wherever possible to help minimize the volume of data sent and the wait time for field professionals to receive updates.
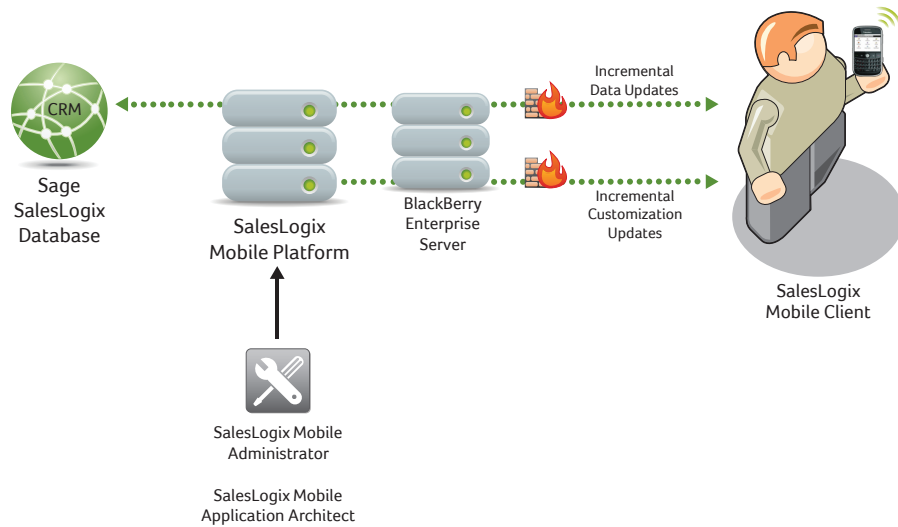
For any changes made to records on the device, only field-level changes are sent to the server. This means that if an address line was updated in a Contact record, only the revised address would be sent, not the entire record. For any change made to the Sage SalesLogix database on the network, only record-level changes would be sent to the mobile device; meaning that if an address field was updated for a Contact, only the Contact record would be updated, not associated information like Opportunities or History. In addition, any changes are further compressed to ensure that the update has the smallest possible footprint.

For BlackBerry smartphones, SalesLogix Mobile works together with the BlackBerry Enterprise Server to provide real-time updates from the Sage SalesLogix database to mobile clients and back. "Real time" works based on a timed interval, where Sage SalesLogix will be checked on a configured interval to assess whether any updates to a mobile user's data is pending. In addition, mobile client-side changes are sent in real time, as they are committed locally on the device. In addition to data updates, any customizations to the SalesLogix Mobile client are distributed as compressed, incremental updates during the regular synchronization process. This ensures that all users have a consistent experience with the latest client changes. Also, this seamless updating ensures that there is minimal impact to the mobile user, as no full redeployment or manual re-install is required.

"...incremental updates ensure users always receive the most up-to-date information with minimal wait time."

Centralizing Administration for Technical Ease

The SalesLogix Mobile Platform is designed to act as a conduit or middleware between mobile devices and the Sage SalesLogix database, handling and processing update requests from the mobile clients. All supported smartphone devices, whether BlackBerry or Windows Mobile, are managed from the same unified infrastructure, to ensure a minimal network footprint and the fewest number of moving parts to setup and maintain. Client configuration and setup for all device types are managed through the SalesLogix Mobile Administrator, which is a unified console, allowing one or more administrators to apply policy, assign customized, role-based mobile CRM clients (i.e., field service, field sales, and support), view logs, and maintain the overall health of the mobile CRM infrastructure.

CRM

Sage
SalesLogix
Database

SalesLogix
Mobile Platform

BlackBerry
Enterprise
Server

Incremental
Data Updates

Incremental
Customization
Updates

SalesLogix
Mobile Client

SalesLogix Mobile
Administrator

SalesLogix Mobile
Application Architect

Building the Case for Mobile CRM in Your Organization

Mobile CRM helps organizations deliver on the goals of their CRM initiative through increased revenue, improved productivity, and greater customer satisfaction and loyalty. While productivity and loyalty are softer metrics to measure, the return on investment for mobile CRM, especially within field sales-focused organizations, will ultimately be measured in terms of revenue realized.

For example, working towards a productivity goal, if a 10-person sales force can be made 10 percent more productive through mobile CRM by driving greater efficiency around key sales tasks and activities or by allowing quicker follow-up on leads, the sales force has virtually been increased to 11, without an additional headcount or associated expenses.

Similarly, for customer loyalty, if customer churn can be reduced by 10 percent through better service and response, the organization is no longer replacing existing customers with new customers, but effectively gaining and building the customer base at an accelerated rate.

When measured against the potential for fully realizing your CRM goals and ultimately increasing revenues, the payback for an investment made in mobile CRM can be measured in months for most organizations.

Conclusion

Smartphones are rapidly becoming the working tool of choice among mobile professionals, thanks to ease of use, discreet access, and always-available characteristics. Adoption is occurring organically, through individual and departmental purchases, and through corporate initiatives with the objective to better support mobile users. As a result, the network footprint is already moving beyond classic mobile tools like laptops. Extending enterprise applications, especially CRM, is no longer an option, but an imperative to sustain a competitive advantage. The question then comes down to not whether, but when, you should deploy to mobile for CRM and which application is best suited for your organization.

SalesLogix Mobile was designed specifically to work with Sage SalesLogix and delivers the key requirements of a mobile CRM solution. SalesLogix Mobile provides:

- Compelling and familiar Sage SalesLogix experience for mobile users, ensuring rapid adoption and time to productivity.

- Broad support for BlackBerry and Windows Mobile devices, enabling users to maintain their device of choice.

- Local data storage and data synchronization options so data is always available and up-to-date.

- Incremental data and application updates supported for quick updating with minimal overhead and costs.

- Robust development environment for both simple and complex customization requirements, using both coded and codeless customizations.

Single, secure infrastructure for supporting a heterogeneous smartphone environment. By investing in the right mobile technologies like SalesLogix Mobile, you can reduce risk and reap the business rewards that come from arming your mobile professionals with the right tools and information to increase their productivity and job satisfaction, which in turn translate into increased customer intimacy, loyalty, and retention. Ultimately, getting customer relationship management "right" for front-line mobile professionals will help drive profitability and greater efficiency throughout the entire organization.

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About Sage SalesLogix
Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

About Sage CRM Solutions
Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

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