

Thought Paper



Winning in the turns Your Mobile SFA advantage

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Abstract

Enterprises have perennially endured the challenge of getting their field force to adopt enterprise SFA systems. Today's Mobile SFA creates a new platform for your frontline to overcome past pain-points as well as manage your customer and pipeline information better. Technology innovations and trends can finally make things easier for your sales teams. However, it is vital to ensure that your Mobile CRM enabler hits the right balance – that it is not yet another ambitious IT plan, the solution is simple and yet ahead in the race of information handling.

This paper talks specifically about how your Business and IT think tank should go about deploying this essential sales tool, shares best practices and lessons learned from Mobile CRM deployments for Fortune 100 companies.

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The SFA challenge that your IT may not know

Detractors have often argued that Sales Force Automation systems are complex, cumbersome and cut down on face time with the customer. Guess what? They are absolutely right. Ask your frontline and they will agree.

The traditional enterprise sales systems have no doubt made selling better. Enterprises today have sales applications that automate sales activities, processes, and administrative responsibilities for their field force. We have all seen SFA enables better pipeline visibility, cross and up-sell, measurable top-line increases and the like. However, what we may not have seen is our SFA tool saving time and money for our sales teams.

We all know that sales processes differ across industries and geographies. Selling often tends to have nuances – it is creative and relationship based. But the pain-points across industries are similar. Your sales team needs simple, easy-to-use tools and your sales management wants to slice & dice all kinds of available information. These needs are typically unmet.

Knowing mSFA – a tool that addresses your SFA challenge

It is easy to start by defining what mSFA (or mobile SFA) is not. It is not a miniature SFA solution on your mobile. It is infact a tool that enables a select set of sales force automation sub-processes to help your field agent manage customer contacts, store critical interaction and view pipeline. Input to this tool can be in the form of data or voice. It is simple and easy to use. It works in a connected or disconnected mode and is designed not to be under the mercy of network coverage.

Based on market trends, mSFA is evolving from a nice-to-have add on to be a must have enabler. It is a horizontal offering that can be leveraged across industries.

This paper talks about how to sharpen your mSFA, how to measure the right value metrics and how not to misuse this powerful tool.

How will Mobile SFA (mSFA) help your business and IT to win?

Fundamentally, your sales team does not like sitting in office and entering data into a complex system with multiple screens. They like spending their time talking to prospects and customers about their product and service offerings – that is the only way they can sell. Your IT organization should fully support this behavior and should even be enabling it. There is no better way to do this than mSFA

A recent study of 175 sales organizations conducted by Aberdeen Group shows that 57% of high-performing companies focus on reduced field downtime as their number 1 SFA priority. Compare this to just 15% of companies that are not selling well that have the same priority.

So, how does mSFA really make that difference? Here are some examples...

- Jane is at a prospective customer's office, waiting to have a critical pricing discussion. She needs to initiate a quote on the fly (based on some recent information she received at the customer's office) that may even help her close the deal then and there. She uses her handheld device to initiate the quote.
- Since Jane has already recorded the proposal and contract discussion with the prospect, she doesn't need to commute back to office or struggle with her laptop. She can directly go for a lunch meeting with another prospective customer. She was able to squeeze in yet another customer interaction today, her 4th such extra meeting for the week (15% more than the average visits every week)
- Incidentally, it is also quarter end time and Jane's manager Joe wants to have an immediate view of opportunities closed in the quarter for his territory. He doesn't need to call up Jane and her colleagues for this information. This time, he is able to generate it on the fly by logging into the enterprise SFA system.
- The IT team has stopped getting urgent requests from Jane and her colleagues to load data from a spreadsheet into their SFA system. They finally found time to work on a new data mining tool that helped generate a list of customers with high propensity to attrite.
- IT management no longer gets calls about a complex system that is really not working for the business.

Not surprisingly, the above benefits have started to drive the market towards mSFA in a very big way in 2008 and the trend will continue into the next decade.

mSFA, though small, impacts your company's very DNA!

As per the same Aberdeen Group study mentioned earlier in this paper, 59% of respondents from best-in-class companies have noted an increase in communication efficiency and 95% have noted an increase in revenue as a clear benefit from their mCRM initiative. The results are impactful and attractive for any organization!

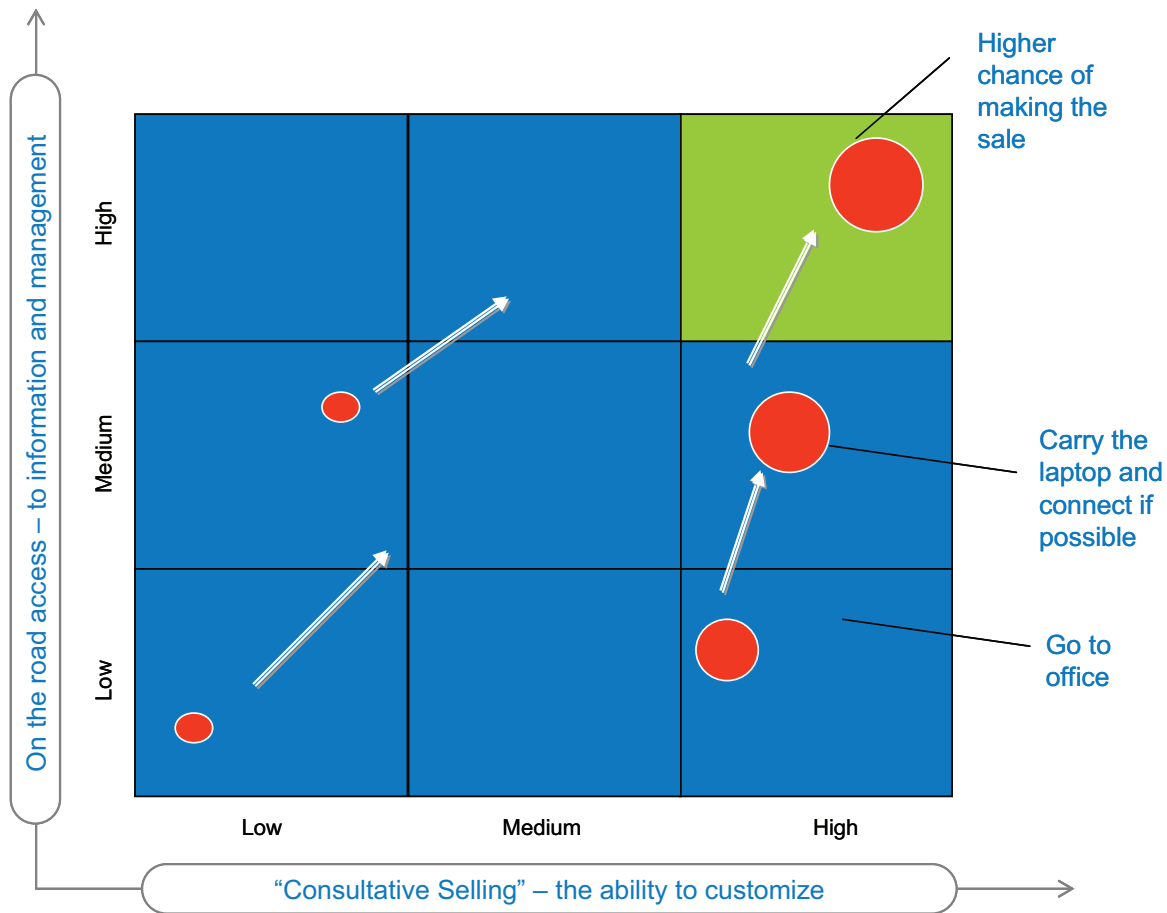


Figure 1: Enabling your cultural mind shift

Apart from the hard metrics of sales person productivity and compliance that we need to measure, if you notice your mobile-enabled organization more deeply, you will be able to understand a clearer cultural shift. Overall, you become a better “consulting” sales organization. It is because your team is equipped with better information at the right time and the right place. No, it is not just an enabler for your sales person but your customer also feels better. In fact, many best-in-class organizations have decided on mSFA with a priority of enabling a positive customer experience by empowering their “consultative” sales organization. The message is not that you will end up sitting in the ideal quadrant of sales effectiveness, but wherever you are, you will end up being better.

While we are on the same ‘cultural shift’ consideration, it is also important to note that enabling your sales team with an mSFA solution requires the very same IT discipline that any other IT initiative will demand. You need a business case and you need to evaluate readiness of your sales force. Why a business case if the benefit is so real? The answer is simple; your current SFA ‘problem’ need not be because you have a cumbersome SFA tool but the very fact that your sales processes need a relook.

Before embarking on a critical mSFA initiative, a leading logistics provider realized that it was sending its sales force to the customer in a lot of situations where conversion rates were traditionally low (around 2% of visits). The immediate action was to figure out if telesales could handle such cases, especially that of low profitable customers. And the company was right. Sales productivity increased tremendously, much more than what could have been ever enabled by their mSFA.

Now, when you are really ready for an mSFA, you have a very positive revelation waiting for you. A clear winner about the mCRM transformation for the enterprise is the very fact that it is not a transformation. It is a quick win; your IT will know it as a low hanging fruit. It doesn't require a massive enterprise initiative to step into this next generation! However, it requires caution, and it requires priorities.

The figure below explains clearly why your company really undergoes a DNA change through your mSFA – the impact is clearly seen at all layers. Team performance, higher quality interactions, customer experience (and performance), a happier sales management and therefore, a growing company.

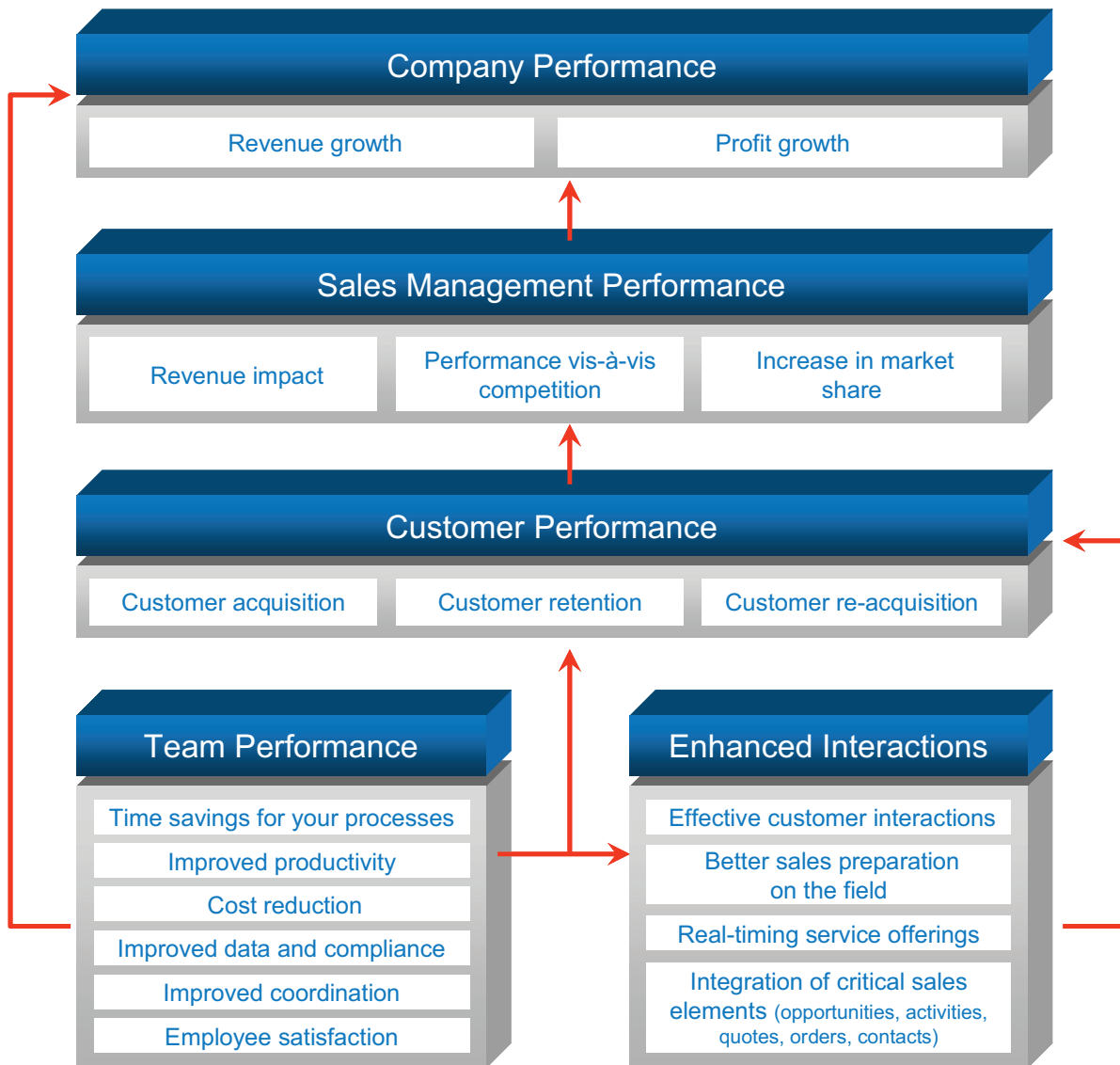


Figure 2: Your mSFA Enterprise DNA

What made these mSFA transformations successful for the best-in-class companies? What are the best practices?

Here are some fundamentals to keep in mind

- *Rule Number 1: Yet again, keep it simple*

Don't fall for all the features offered by the mSFAs. Remember, your sales team will love the device only if it is simple. This time, your IT team is not going to be asked to provide complex screens, views and fields. The sales team is going to insist on simplicity.

Ensure that you think about your sales person on the road, not about the robustness of his handheld. Remember that unwanted data, scrolling down is going to be counterproductive. Jane may have to miss her extra meeting.

- *Keep in mind – mSFA also means voice*

The next generation Mobile tools have started entering the market, especially in 2008. The tools look sleek, the screens are better and they are a lot friendlier. But your sales teams may still miss their laptops; they are still simpler. Contrast that with the simplicity of voice as an input – that's a huge plus for likeability and productivity. Speed of voice entry on an average will be 6-7 times faster than speed of the keyboard – there comes a straight benefit.

Some mSFA tools in the market will eventually update frequent information just by the trigger of a voice message from the sales person. Already being referred to as the "Voice 2.0" generation, tools like Ribbit's 'Ribbit for Salesforce' specialize in voice to text conversion and can make it work on your mobile device.

- *Get your device to work offline*

Connectivity challenges are inevitable. Your device is not going to be connected 100% of the time. Getting your mSFA to work offline is a very acceptable (and as a matter of fact, critical!) for your sales teams. We have seen that this ability is a significant adoption driver for your mSFA. It not only gives some critical information when you are disconnected but also gets you to enter information without having a paper trail backlog. If this criterion is not met, your mSFA will not work. So, offline mode should be a 'Phase 1' focus.

- *Focus more on 'pull' rather than 'push'*

During your initial mSFA days, expect your sales team to struggle a little bit to enter data. However rich your mobile device, it is not going to be simple. One way that some successful mSFA initiatives have managed this is by focusing more on pulling data from the enterprise (always a key requirement on the road) than pushing data to it. Agreed, your full benefits are going to come only with push (and maybe, through voice), but this is just a temporary starting point. A baby step to move in the right direction.

- *mSFA supports your enterprise SFA; does not replace it*

Your sales person needs to know upcoming customer calls, maybe drop an email to the customer while on the road, make some important notes after a customer just called, and update the latest visit schedule. These are routine tasks on any typical day for your field rep. Make sure these basic, frequent tasks are taken care of by your mSFA. Maybe have a few alerts and important communication flows in there as well.

Don't take it for an enterprise SFA substitute though. A cumbersome view with plenty of data is not required on the mobile. A mobile should help plan your rep's day, maybe not the next two quarters. The IT consequence in trying to imitate the enterprise SFA is that it usually results in a troubled, suboptimal and underperforming mobile solution.

Oracle's 'mobile sales assistant' is a good example of how an mSFA can complement your enterprise CRM solution.

- *Don't try a "big bang" IT solution*

This point doesn't just apply to mSFA but it is nonetheless an important one. Technically speaking, moving a tremendous number of functions and data at one shot into the mobile will pressurize the technology architecture. This will typically create an unreliable, low performance and low adoption mobile solution.

Start your mSFA solution with a rollout of essential critical functions to a smaller set of users. Your sales team will really look forward to this change and you need to ensure the mobile generates a positive user experience.

Finally, please measure your business benefits

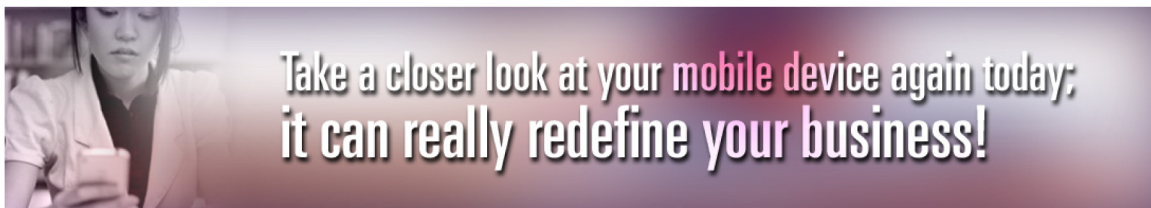
The best way you can get to know if your mSFA has been a success is by studying the effectiveness of your sales force.

Ask yourself if ...

- Your mSFA has reduced the time it takes for winning your opportunity from the time you first know about your customer (reduced sale cycle)?
- Call and opportunity information are more complete and clear (data compliance)?
- The number of customer/prospect meeting visits and conversations has gone up from pre mSFA days (productivity)?

If the answers to all the above questions are yes, not only is your mSFA initiative a success, but you are most likely to see an increase in your top-line (direct, but not so measurable benefit). If one or more of your answers are no, start again from ground zero!

You may want to note - all the answers for the above questions are very easily measurable. You should start getting the answers to these questions anywhere between 3-6 months from the time you introduced mSFA to your sales force. There is no way to escape these measures, it is that simple!



References

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- [Investment Themes Driving the North American Mobile CRM Space \(Sep, 2008\)](#): Frost and Sullivan Research Report
- [Objectives and success factors of mobile CRM projects](#): Mathias Hartel (Literature Survey)

About the Author

[Badri Srinivasan](#) is a Senior Consultant with Infosys' Customer Relationship Management practice. He has over 6 years of experience helping define SFA strategies for Fortune 100 customers in Banking, Insurance, Hi-tech and Logistics industries. He has managed and participated in a variety of projects to define CRM technology strategy and plan, optimize sales processes, identify operational improvements and develop business architecture for transformational CRM initiatives featuring Oracle Siebel's CRM suite.



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