# Why Go Mobile?
Six Strategic Objectives You Can Conquer With Mobile CRM
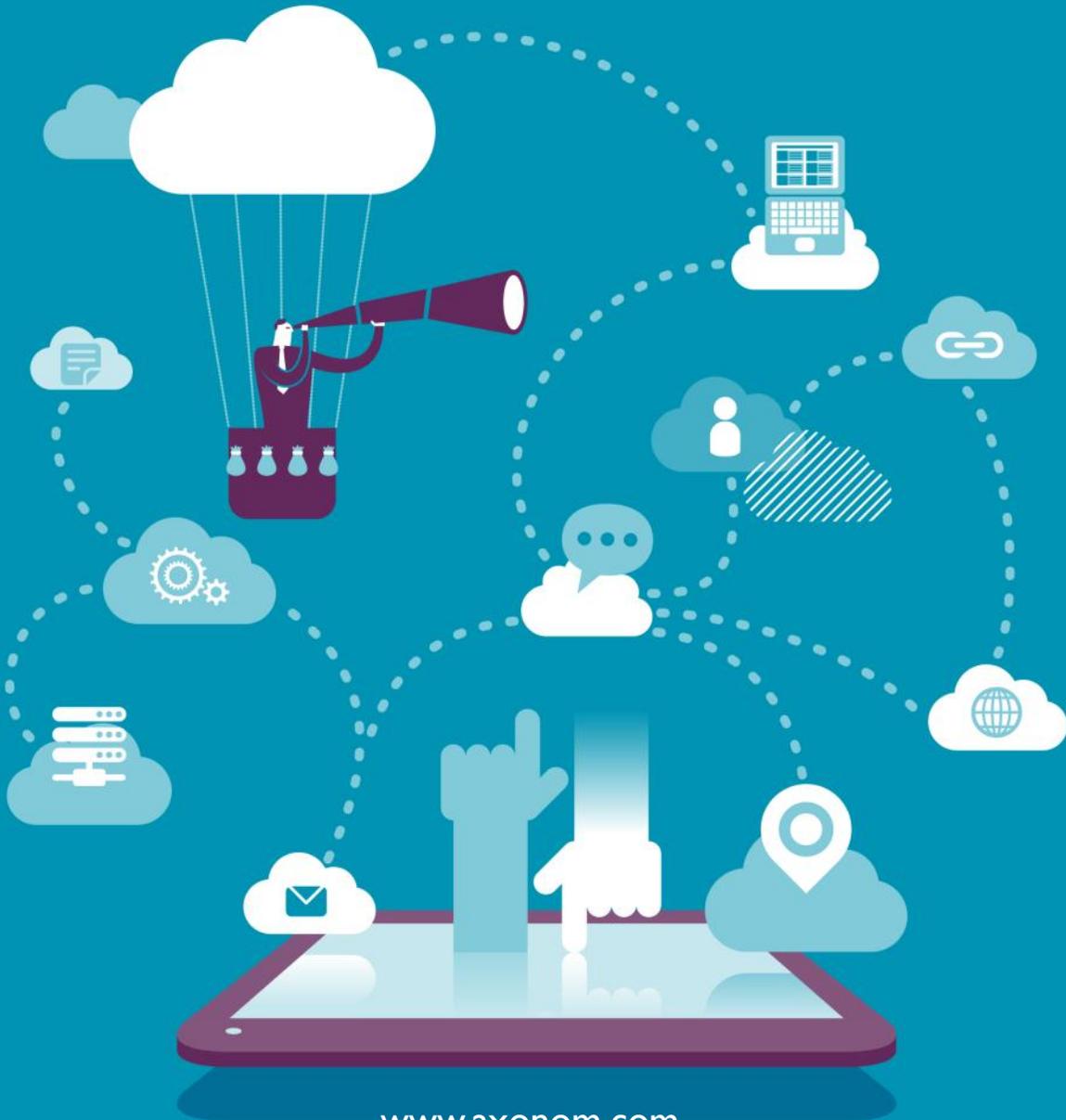
Everyone's talking about how important it is to implement mobile solutions for your business. But can mobile really make a difference to the bottom line of your business?

The answer is a resounding YES!

In the current competitive environment, your company's strategic objectives have probably gotten more granular. "Increasing sales by 20%" as a corporate goal just doesn't cut it. **How exactly** are you going to increase sales? That is the real question.

Strategic objectives have to get specific so the organization can focus on fine tuning the outcomes that have the most impact on the bottom line.

And, that is where mobile CRM comes in. Customers these days expect you to come to them, so agility in the field is a must have. It's not good enough to just be there, either. You need to have the information that the customer needs now. Not tomorrow with a follow up phone call. **Now. To close the deal today.**

Look familiar?

If any of the goals below look familiar, you are in the right place. This white paper was written for you.

- Increase average sale by 20%.
- Lower cost of sales by 15%.
- Reduce billing lag time by 30%.
- Achieve 90% key field completion in customer records.
- Increase average number of service calls per week by 15%.
- Deliver 100% real time data to managers.

We'll look at **exactly how** you can achieve these kinds of strategic goals. The kind of goals that put you ahead of the competition and put money in the bank.

Let's get started, **now**.

Mobility's Big Six

The CRM Software Blog is proud to bring you *The CRM PANEL PAPERS.*
A straightforward series of white papers from an international panel of
CRM software experts.

Sources: Aberdeen Group, "Sales Mobility: How Best-In-Class Remote Sellers are Re-
placing See with Do", April 2012; www.att.com/gen/press-room "Uncrossing the Wires:
Starting-and Sustaining-the Conversation on Technology Value"

1. Increase Sales Values

Your sales people are highly motivated to close higher value sales. While that may seem like an obvious statement, do they have the best tools to accomplish that objective?

Salespeople with immediate access to account history, product information, price lists and promotions can offer customers more options to build sales. No return calls, no calling back to the office for approval, no delays.

Keep great salespeople

Mobile technology has become such a differentiator that companies that don't provide mobile CRM to their sales people will struggle to fill the vacancies left by those exiting for more agile employers. The ideal solution will allow each sales person to use the device that he or she is most comfortable with. Whether it's an iPhone®, iPad®, Microsoft Surface™, BlackBerry®, Android™, or Windows® Phone, they will be more motivated to use it when they love it.

Case in Point #1

Sales team builds healthy relationships

A health-care provider partners with doctor's offices, clinics, hospitals and senior living facilities to provide physical, occupational and speech therapy services to their patients. The therapy provider has a mobile sales team dedicated to building relationships with the medical facilities. The reps use Microsoft Dynamics™ CRM to access their daily call routes, enter call notes, review past notes and check customer history.

> " In today's market it is important to differentiate yourself from the competition. Mobility is a way to increase the level of customer service. "

> "
>
> Companies who want to provide the best in class service will embrace Mobile CRM as a strategy for business growth and success.
>
> "

When the rep walks in the door, she is ready to make the most of her time with busy doctors and administrators by focusing the conversation on the future instead of the past. Reps have more time to spend understanding changes in each customer's business and making suggestions for new services that can augment the practice.

The increased efficiency and improved access to information has driven sales up 25% and increased prospect visits by 35%.

Case in Point #2

Better information builds sales team's spirits

A Beer/Wine/Liquor (BWL) distributor's field sales team makes weekly calls on their retail store clients. In the past, each sales rep delivered a catalog of upcoming BWL product promotions and rebates. Using their paper order forms and notebooks, they would note current needs and talk about future special event and holiday needs.

When the reps returned to the warehouse they called the client to confirm orders and find acceptable replacements for out of stock items. On the next call, they would review the catalog and start all over again.

Now that each salesperson is equipped with an iPad with Microsoft Dynamics CRM the team has transformed into a proactive sales force instead of order takers. They can access current stock in the warehouse, suggest replacements for backorders and recommend new products. They work with stores to plan special events based on upcoming promotions to build sales for their customers and themselves.

The Strategic Advantage

Increasing the dollar value of a sale is all about solving more of your customer's problems or helping them increase their revenues. With full information about the customer and the products, good sales people will find the match and build the sale.

When sales reps get to use the mobile device of their choice, user adoption soars and so does the current information in your CRM system. Choosing a system, like Microsoft Dynamics CRM that supports many devices will pay off with increased sales and richer data.

Mobile technologies that will increase productivity in next 24 months

Tablets	91%
Smartphones	87%
Laptops	33%
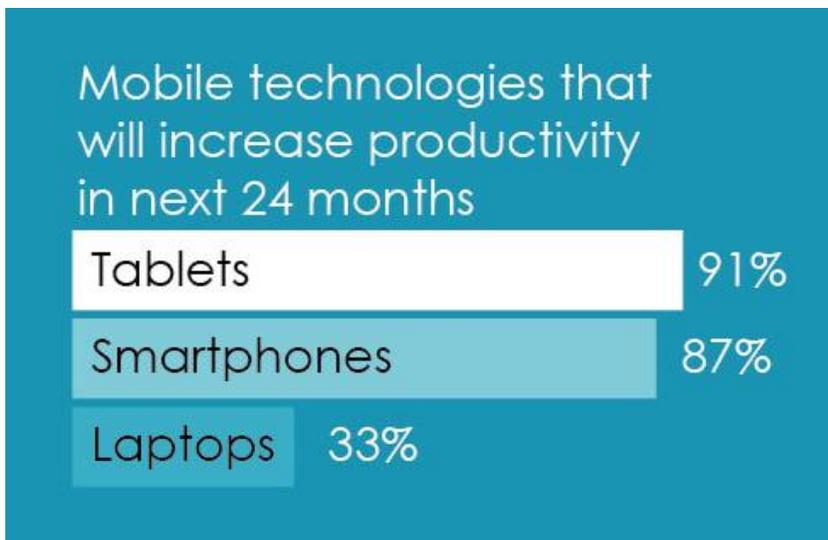
2. Shorten Sales Cycles

Closing sales with fewer interactions keeps sales people working on new opportunities that build revenues. In addition to the benefits like lower cost of sales, higher sales pipeline velocity and faster inventory turns, accelerated sales cycles allow sales people to earn more commissions. Everyone wins.

Unique business sales cycles

Since every business has a unique buying process, you need a system that can deliver the right information at the right time. From inventory availability to delivery costs, your sales people need to be able to quickly answer whatever questions come up. Sales close faster when your sales people can anticipate and react to your customer's buying process.

Case in Point #1

Reps lighten up sales calls

A leading manufacturer of sensors for lighting, HVAC and security sells to universities, hotels and residential complexes. The manufacturer's field sales force demonstrates the benefits and capabilities of the products when they visit their existing and potential customers.

Since implementing Microsoft Dynamics CRM, sales people get up to speed for each sales visit directly through their mobile device. Armed with in-depth knowledge of the prospect's facilities before they walk in the door, the sales reps are prepared to solve the customer problems as well as suggest improvements through new products.

> " Mobile CRM allows remote employees to use – from their phones – the same powerful systems that were once only available on company computers outfitted with very specialized and expensive software. "

> "
>
> Serving customers well starts by serving employees well. Your people must be enabled to serve customers at the highest level possible by providing them with complete and accurate information, well-defined business processes and easy to use collaboration tools.
>
> "

Sales reps can answer questions about inventory, expected delivery dates and payment options immediately. Because their meetings go so smoothly now, prospects are often ready to sign on the dotted line on the first call.

Case in Point #2

Recycling connections

Customers and vendors frequently make in-person visits to do business with a regional materials recycler/producer. Those visitors need to know where facilities are located, as well as who will be at the facility when they arrive, order history and current commodity prices.

With the help of a technology partner, the recycler created an app for their customers to locate company contacts and post daily commodity prices.   The underlying information is managed in Microsoft Dynamics CRM and delivered through the mobile devices of customers and vendors.

Mapping functions allows visitors to quickly find facilities and make contact when they arrive. Customers and vendors alike have found the app makes it much easier to do business with this forward thinking company.

The Strategic Advantage

The bottom line in closing sales faster is to anticipate the buying cycle of your customer and deliver the information they need to move the process quickly. No delays, no researching to find out if the product can meet their timeline, no missing specification documents.

Delivering information to the field allows your customers to have the information they need to convince the boss or compare options or include in the budget – the input that they need to finalize and purchase. Make that information easy for them to get and you will close the deal faster.

3. Accelerate Cash Flow

Cash flow is the lifeblood of every organization. By reducing the time between service delivery and billing, you gain cash velocity that can cover expenses and fuel growth. If there is a lag between when service techs complete the work and when they submit work orders to accounting for invoicing, your cash flow is slower than it needs to be.

Mobile has transformed service-based businesses

With mobile solutions you can eliminate billing lag time entirely. Every type of business that delivers service in the field – from technicians to accountants – can improve cash flow by reducing the time between service delivery and billing. With current technology, you can even invoice inventory sold in the field, like parts and consumables, as quickly as you can in the store.

Case in Point #1

Airport security firm keeps cash moving

For a manufacturer of security systems designed for airport checkpoints, field service is a key component of their operations. Field service team members use Microsoft Dynamics CRM through a mobile device to manage their work on client locations, including:

- service scheduling,
- access to the customer's installed products, including product model, serial number and last repair,
- updates to service tickets as well as parts requests.

> "
> Today's employee needs to be mobile and can't be tethered to a laptop. Being able to get information at their fingertips is essential.
> "

"

Whether a company uses a mobile CRM solution to update a hot opportunity, extend inventory lookup, quote generation, service case completion or financial portfolio reviews; mobile helps customers reduce their sales cycle, billing cycle and increase customer satisfaction.

"

Service managers use Microsoft Dynamics CRM Online to assign or re-assign cases to field service technicians. Technicians receive case notifications and accept cases on their mobile devices and are able to continually update the case.

When all work is complete, the field service technician runs a customer service work order report and saves it to PDF. From the technician's tablet, the customer signs the PDF report to approve and verify job completion. The technician closes the assignment and submits for billing before leaving the customer site.

With Microsoft Dynamics CRM, the manufacturer realized a 48% increase in service revenues between fiscal years 2010 to 2012 due to the greater productivity of the field service. DSO (Days Sales Outstanding) has been reduced by 10 days providing a significant cash flow impact to the business.

Case in Point #2

Process flows for water solutions provider

A filtered water solutions provider serving commercial customers used to depend on paper documents to request, schedule and track service orders. Performing installation, maintenance and support of these solutions, the technicians would receive work orders from the scheduler on Monday morning and then manage their own time for the week. When the work orders were completed, the technicians would return them for billing a week or two later.

With no visibility into scheduling and completion of jobs, schedulers had to call multiple technicians to find someone with time to solve a customer emergency. Completed work orders were often late or permanently lost resulting in at least 15% of jobs invoiced late or not at all.

After implementing Microsoft Dynamics CRM, the schedulers have real-time visibility into technicians' schedules and job completion. Now, they can schedule emergency calls in seconds, updating the technician's calendar without interrupting their current work.

As technicians complete their work and close the work order, Microsoft Dynamics CRM workflow creates the invoice instantaneously – before the technician returns to their vehicle.

The Strategic Advantage

With Microsoft Dynamics CRM, the entire process of closing out a service order can be automated to ensure that customer invoicing follows quickly and accurately. Fully connected service reps can focus on service delivery and billable work instead of wasting valuable time on administrative data entry.

The productivity and customer service improvements that technical support teams realize through mobile technology is transformational. Those productivity gains start in the field, but follow through to the back office. Automated accounting processes accelerate cash flow and allow everyone to spend more time on revenue generating activities.

89% of executives say the use of mobile devices will be most important for their companies' success within the next three years.
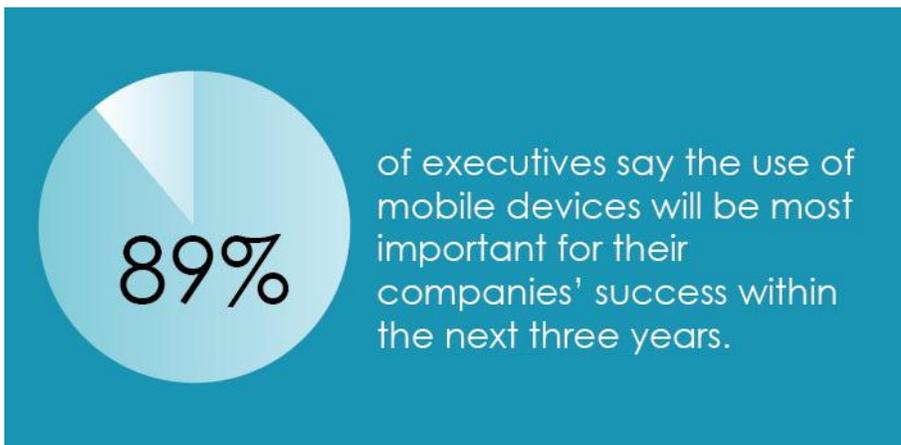
4. Collect Information at the Source

Reducing the number of steps between the source of data and the collection of data improves the accuracy of the information. Errors and misinterpretation can happen whenever there is lag time or re-keying of data. Mobile technology provides the means to simplify data collection in the field for better accuracy and real time data availability.

Keep technology in the background

In the field, the device can be as important as the data collection. Laptops can set up a "wall" between the customer and the service technician. With an iPad or Surface device, the experience is more collaborative and less intrusive.

Case in Point #1

A healthy prognosis

A health care service provider performs comprehensive in-home patient health assessments for insurance and health care organizations. Nurses are scheduled to provide the health assessments as a health plan benefit.

In the past, patient scheduling was done manually with complicated coordination of nurse and patient availability. Nurses filled out a 12-15 page paper form while on site with the patient.

The forms were then faxed to the main office where the information was manually re-entered into a digital file. That data was then processed, uploaded and submitted to the insurance firm as a report. Errors, missed entries and delays of submissions of reports were common.

> "
> Working remotely is no longer an exception, but the rule. Since, customers expect you to have answers quickly – you need access to information no matter where you are working.
> "

"

You don't have to return to your office any longer to answer questions or deliver information to your customers. Meet your customers' need when they need it.

"

Now that the service provider is using Microsoft Dynamics CRM on an iPad or Surface device, the visiting nurse enters information directly into the insured's record, including:

- past medical history,
- current patient health conditions,
- current medications.

The information from the assessment is available to the central office immediately so that reports are sent to the insurance companies quickly. Data accuracy, which could have life and death implications, has improved dramatically.

Case in Point #2

Insight from the stars

A marketing consulting company offers a very unique service to Fortune 500 companies by gathering information from the celebrities who influence the public. The consulting company has built personal connections with the celebrities over the years and supply complimentary products for review.

After the star has used the product for a while, field agents visit them to collect their feedback. The interview is scripted in a survey scripting solution built for Microsoft Dynamics CRM, helping the agent to ask pertinent questions based on responses. The agents use iPads or Surface devices for a less intrusive interview experience.

The information gathered is reported back to industry-leaders for direct insight into trend-setting information from social influencers. The Fortune 500 companies use the information – from demographics to product add-on preferences to colors – to make proactive product changes and focus promotions.

In addition, the marketing consulting company is updating the celebrity's contact and agent information and building relationships for future engagements.

The Strategic Advantage

Increased data collection and better accuracy builds the collective insight of the organization. Along with the ability to gather more data, businesses are beginning to do a better job of harnessing the meaning through analytics. Hand in hand, these improving technologies provide significant competitive advantage to forward thinking companies.

The number of ways to use mobile technologies in the field is endless. By removing the barriers of technology, interaction with customers can be simpler, friendlier and more productive. As the quality and power of mobile devices improves, they become a seamless part of the field-based employees' daily life.

84% of organizations support remote workers

5.

Increase Productivity

More and more employees, especially service delivery personnel complete their work without ever going into the office. Technology today allows you to extend the organization to fully support and embrace the remote workforce.

Fuel productivity in your workforce

With mobile technology, you can increase the productivity of service technicians before, during and after the service call. Depending on priorities, automated scheduling will route employees to the most critical jobs or the closest jobs. With full information, the technician can get to work upon arrival, without having to ask customers questions that have already been answered. Automated processes allow the technician to focus on service delivery instead of filling out forms.

Case in Point #1

Road warriors play it safe

A fire prevention and safety equipment distributor keeps their technicians and service representatives "on the road" 99% of the time. Their cell phones are equipped with mobile CRM software and fully integrated with Microsoft Dynamics CRM. They have easy access to the information they need to go from one client to the next and perform the contractual services for each client on schedule.

"

Mobile CRM empowers your people to deliver a quality customer experience no matter where they are. Service teams become powerful sales teams with the right technology.

"

> "
>
> An effective mobile CRM strategy should be ever-evolving. It is critical to remember that the strategy needs to precede the device in order to maximize the impact of the investment that you will be making.
>
> "

When they have completed each installation or service call, the field agents use mobile devices to track and follow up with customers on:

- test results,
- additional services that will be required based on tests,
- additional or replacement products that need to be installed.

Instead of filling out paper forms or accessing different systems, the agents use their mobile devices to:

- transmit the billing information to their accounting department,
- close the case and schedule the next service appointment,
- check their schedule for the rest of the week.

Productivity of the team has increased, allowing the road warriors to enjoy their downtime instead of catching up on paperwork.

Case in Point #2

Instant gratification for truck stop artists

A media and information company employs over twenty field service reps to visit approximately 1,200 truck stops across the country each month. The service reps deliver products, set up point of sale displays and take photographs to document service delivery.

In the past, the process was managed through paper, digital cameras and faxes. Routes were mapped by corporate personnel who mailed a hard copy, along with the relevant work orders to each field service rep. At the completion of each visit, the rep would fax a completed work order. At the end of the month, the rep would mail the camera's memory card to the corporate office.

Back at the corporate office, each faxed work order had to be manually entered into a database. In addition, three to four employees worked full time downloading, sorting and renaming approximately 8000 photos by location, date and work performed. Reports were delivered to the customer in spreadsheet form.

Now that the media company has implemented Microsoft Dynamics CRM with a fully integrated iPad app, routes are mapped automatically. During the visit, all the work order information is entered into the iPad, updating CRM instantly. The iPad camera captures photos with location, date and work performed automatically attached. An integrated customer portal allows customers to view their new POS displays moments after they are completed.

The Strategic Advantage

Service professionals with access to real-time information prior to and during a customer visits can focus on the service delivery and proactive support. With information like account details, maintenance contracts, support history and current outstanding support incidents, service technicians are empowered to go the extra mile for the customer.

> " In the world today, well equipped executives and sales reps often have three devices in their arsenal - smartphone, tablet and pc. Having the proper device for each task is key to maximizing the productivity of customer-facing teams. "

6. Improve Insight

The amount of information that is collected and available for every aspect of business today is overwhelming. Information overload does not help employees make better decisions or deliver better service. To get the full value from data, people need meaningful data that directly applies to their role in the organization.
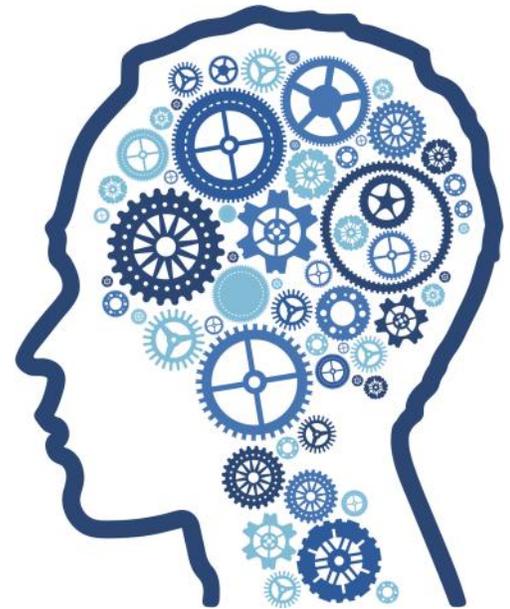
A single source of role-based information

The ability to go to one place and get all the information that you need to accomplish the job at hand builds productivity and inspires better decisions. That technology enables you to take that information with you is revolutionary.

Case in Point #1

Commercial banking to go

A regional bank employs 50 commercial bankers who call on business and institutional clients in person to build relationships. Typically, each commercial banker is goaled on approximately 100 in-person appointments and client phone calls per month.

In the past, the bankers recorded appointment details in Excel-based "call sheets" which were emailed to administrative assistants at the end of each week. The admins would manually combine the spreadsheets which were used to generate the division's management reports and charts.

Through Microsoft Dynamics CRM enabled for mobile, the commercial bankers now have the ability to perform all activity

> " A younger, tech-savvy workforce is driving the consumerization of IT and increasingly expects to interact with corporate data on their device of choice. "

> "
> Mobile customer relationship management software is kind of like having the sales and marketing team along with you on the road.
> "

tracking and call reporting from mobile devices. The time savings from manual data entry has resulted in a 15% increase in customer call activity per banker.

Now managers are able to monitor call activity and results through real time dashboards. The time that the admins used to spend building reports is now devoted to business development activities in support of the commercial bankers.

Case in Point #2

Non-profit leader dazzles donors

Every year, the president of a non-profit association travels across the country to meet with donors and decision makers. To prepare for each meeting, the president reviews the history of the association's relationship with the benefactor, including past donations and support.

Preparation for a trip used to take days or weeks because donor and influencer information was housed in 6 different systems. Creating reports with combined information that the president could refer to before a meeting was a painful, manual process.

Since the association implemented Microsoft Dynamics CRM, the president can access all the important details before a meeting on her cell phone or Surface. The ability to access information from across the organization in real time allows her to respond to questions immediately, building confidence and goodwill with benefactors.

The Strategic Advantage

Customers have different expectations than they did ten years ago. They expect you to know their history with the organization and they expect you to have information at your fingertips. When you have to follow up with answers you risk a competitor beating you to the punch.

Next Steps –
The Mobile Imperative

Most companies are struggling with the same problems that the businesses in our stories decided to solve. Whether your business has always had a dispersed sales force or you are just getting started with field service, it's time to connect them to the information that they need. Supporting mobile devices is no longer a choice, it's an imperative.

Connected employees

Remote employees are dependent on mobile devices to connect to their personal lives and they expect the same from their business. Young people, remote workers or not, want to work for companies that support their "always connected" lives.

Responding to the ever increasingly connected world presents real challenges…and real opportunities. The strategic initiatives that we have addressed in this white paper can all be achieved **because of the mobile revolution**…not in spite of it.

Take the next step

If you're looking to extend revenue generating business processes to mobile devices, turn to Powertrak. Axonom's Powertrak solutions are Certified for Microsoft Dynamics CRM (CfMD) and designed to guide and capture survey information, manage the quote-to-cash cycle, automate time entry and billing management processes, and streamline transactions.

If you would like more information about evaluating or implementing Powertrak and/or Microsoft Dynamics CRM, contact us today.

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Microsoft Dynamics CRM—Unlock Your Potential

You strive to outsmart and outpace your competition, so you understand how important it is to equip your people with the right customer relationship management (CRM) tools to win. Get the tools that help make the internal processes simpler and easier so your sales, marketing, and service teams can focus on what is important—creating a better experience for your customers.

With Microsoft Dynamics CRM, your teams become prepared and insightful, collaborative and connected, quick and mobile, and highly productive.

The freedom of choice deployment

When it comes to deployment, Microsoft believes that you should have the option to choose the method that is best for your organization. Every company is unique, with different financial, geographic and personnel factors that impact your choice for software deployment.

On-Demand – With Microsoft Dynamics CRM Online, you get powerful CRM software delivered as a cloud service from Microsoft, providing instant-on anywhere access, predictable pay-as-you-go pricing and a financially backed service level agreement (SLA).

On-Premises – In-house deployments give you complete control of your data and your software. Integration with other applications may be easier when all the solutions are in one location.

Partner Hosted – If you want to maintain ownership and control, but want to minimize IT personnel and hardware costs, deploy Microsoft Dynamics CRM through a partner hosted model. Partners manage the hardware, upgrades and support while you maintain ownership and easy access.

Become a dynamic business – serve your customers as one team

Your customers want the right answer the first time, not departmental transfers and misinformation. Connect your teams on one single platform to build an organization that fosters collaboration and coordinated service to the customer – tearing down the silos of information.

With Microsoft Dynamics CRM sales, customer service and marketing will have a unified view to focus their combined energy on winning and serving customers.

Test it out. Get started with a free 30-day trial of Microsoft Dynamics CRM Online.

About Axonom

Whether in Sydney, London, Los Angeles, or anywhere in-between, customers turn to Axonom for our award-winning, industry-specific, Powertrak enhancement solutions, and rich expertise in Microsoft Dynamics CRM.

Founded in 2002, Axonom is an independent software vendor that designs, manufactures, and markets Powertrak, the innovative B2B revenue management suite for Microsoft Dynamics customers. With a vertical-focus, certified solutions, flexible deployment options (Cloud or On-premise), and hundreds of Microsoft Dynamics CRM and Powertrak implementations worldwide, Axonom is considered one of the top and most trusted Microsoft Dynamics partners in the world. Enriched with mobile extendibility, the Powertrak product line includes: Product Configurator, Time and Billing, Forecasting, Customer and Partner Portal, Contact Center, Service Management, Event Management, Design Win, and Editable Grids.

Additional Resources You Might Enjoy:

24 Wildly Creative Ways Companies Use Dynamics CRM to Drive Revenue and Serve Customers

Gain Greater Efficiency, Agility and Control with a Unified ERP and CRM Solution

Learn how to Create Quotes, Configure Orders, and Enter Time and Expenses on Tablets

Build Valid Quotes, Proposals, and Orders with Powertrak Mobile Product Configurator

See how Billing Managers Utilize the Features and Functions of a Mobile Time and Billing Software

Axonom has a long-standing tradition to not only educate, train, and consult customers but also implement the right solutions for their business to be successful and profitable.

The combination of Powertrak and Microsoft Dynamics CRM helps companies successfully sell and service to its customers and partners in an environment that requires multi-level relationship tracking, web self-service, partner/dealer loyalty management tools, streamlined quote-to-order processing, time and billing management, hassle-free payment options, and a worldwide presence.

If you're evaluating Microsoft Dynamics CRM or need mobile automation tools, please contact Axonom.

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