



Mobile CRM

A Customer Relationship Management White Paper



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Mobile CRM

Mobile Marketplace

The mobile marketplace for Customer Relationship Management (CRM) users has been growing for the past several years, and is expected to continue to grow at a high rate in the coming years.

Just ask yourself how many days a week do your Sales Agents spend away from the office; on the road, on airplanes, working from home. Like most traveling sales agents, your sales agents probably spend the bulk of their time out of the office. In the past, when traveling out of the office, we did not necessarily have the means to carry with us the vital information needed to help close sales. While today most agents have laptops and briefcases to manage the required customer information while mobile, it's often cumbersome to input or retrieve data, and the data we gather is often disconnected to our main customer management systems in the office.

Sales agents are sometimes out of luck when it comes to capturing the most up-to-date information. Having up to date, accurate information is important in the office, but arguably more important while out of the office. Why? Because information while at the point of sale, while in front of the client, and while performing high value sales and service processes can make or break the difference in the customer experience.

Mobile Business Management

Having up to date client information, history, notes, day-to-day activities and plans, and sales information is vital to the mobile sales professional. This vital information helps drive revenue and improve customer loyalty. If a mobile user does not have quick and seamless access to key information, available via a device best suited for mobile work, their reach can be significantly limited resulting in lost sales, competitive disadvantage and ultimately dissatisfied customers.

A key tool for the Sales Agent is inarguably the cell phone – however historically the cell phone has been used for two primary purposes: to place calls and send emails. And while this mobile phone serves this purpose without fail, the challenge for the mobile sales agent is that client calls, meetings, e-mail and customer history all were commonly stored separately from CRM data on their device, if this information was even stored at all.

Previous generations of mobile CRM applications had three inherit problems. 1) Speed and cost of the wireless airwaves, 2) data storage on the device, and 3) CRM features created distinctly for the mobile user.

It can be argued that the speed of the wireless airwaves years ago did not support large data transfers. We simply could not send CRM data to and from the device at the speeds currently available. Not until recently have we had access to stable, reliable ways to transfer data packets through our wireless carrier - at an affordable cost. For example, features such as trickle sync used by BlackBerry® smartphones allows data to be sent to and from the device when the device is in sync with a wireless carrier, enabling a more cost effective data transfer mechanism. With this sync mechanism users are no longer prompted to synchronize; devices automatically understand what

data to send, when to send it and how much to send. Today the data we synchronize back and forth from a device is now packaged up in a way similar to .zip technology, compressing the size of the data needed to be sent via the wireless airwaves. This method of transferring data results in greater time and cost efficiencies.

Another problem with older devices was that these devices did not have the storage capacity to adequately capture CRM data needed for the mobile environment. However, nowadays, mobile devices have enough capacity to store a tremendous amount of the data types we require while out of the office.

With the emergence of the smartphone technology and other Personal Device Assistant (PDA) devices, storage and wireless airwave capabilities are no longer issues. The device and wireless networks are now in sync with two key requirements of the mobile sales agent, data storage and data speed.

What about the features required within the mobile CRM realm?

In the past, CRM vendors did provide mobile CRM applications on devices like the BlackBerry or other PDA's. The problem was that the features provided were a shrunk down version of what came in the shrink-wrapped CRM application being used in the office. The belief was that everything we did in the office as far as CRM was concerned should be brought down and exposed through the device.

Vendors tried to stuff all information and business workflows needed for online CRM such as, lead ranking and routings, opportunity methodologies and forecast submissions onto a device not suited for those purposes. The application technology had limited storage capacity and limited ways of pushing and pulling data from the device with the ability to display these CRM features very limited.

Finally – does a Sales Agent really need access to ALL that data while out of the office – or do they in fact have a distinct set of data they need?

Mobile Device Management

In order to address these challenges, CRM vendors needed to take a step back. Mobile CRM vendors now understand they need to utilize features native to the device and leverage what the device is actually used for in the first place; to make client calls and send and retrieve email communications.

FrontRange Solutions developed GoldMine™ Mobile Edition for Blackberry® with these past challenges in mind. What GoldMine Mobile for BlackBerry does is first interact, capture activities commonly performed on the device, and then provides the mobile sales agent all relevant information for their day-to-day activities while out of the office.

GoldMine Mobile captures email history for CRM contacts while storing call activities made from the device. GoldMine Mobile allows users to initiate emails and calls directly from the GoldMine contacts on the device in an easy to use fashion. The mobile BlackBerry application uses Research In

Motion's (RIM®) track-ball feature, which quickly gives users a configured menu list for contact activities which include 'send email' and 'call contact numbers'.

Manage Contacts and Activities

Once the most commonly used business functions were integrated into the devices, a focus was then placed on other aspects of CRM important to a sales agent.

Client information reigns important considering the reason we are out of the office in the first place is to visit our clients. GoldMine Mobile synchronizes contact information from your core GoldMine installation down to the device where the users can view each client's contact information including notes, activities and opportunities. Mobile users can also edit contact data from the device as well as create new contacts. Now important client information is not lost and new information can be captured.

Also vital to any mobile sales agent are the activities they need to perform while mobile. Previously this information may have been stored in the local device Calendar features, but it was not often integrated with the online CRM system. This lack of integration kept many sales managers in the dark as to their sales agent's daily business activities. Not only did it keep them in the dark on some subordinate activities, it also left them unable to help their sales agents manage their day better for a more efficient sales process.

GoldMine Mobile synchronizes each user's activities to and from the Blackberry device. Now calls, meetings and appointments are not missed. In a typical inside sales/outside sales environment the inside sales assistants are constantly creating new calls and meetings for their outside field agents. With GoldMine Mobile, when an activity is created by the inside sales team, the activity information will automatically be synchronized to the field owners device. This leads to more calls, appointments and sales; a true team selling instance.

Opportunity and Key Items

Opportunity management also fares well in this team-selling atmosphere. GoldMine Mobile synchronizes all pertinent opportunity information with the device. Any changes made from the device or to the corresponding online opportunity are synchronized. These changes are now visible by any sales team member who has access to the sales opportunity. Mobile sales agents can access all information about the sale, ranging from products and services, sales stages and sales activities to competitor and influencer information for that opportunity. This instant, real-time access helps mobile sales agents put their best foot forward during sales calls and helps differentiate your business from your competitors.

Mobile users need access to data quickly. They sometimes can't afford to boot up a laptop, or find a wireless hot spot. Because of this necessity for quickness, GoldMine Mobile has a Key Items feature that allows the mobile user to simply flag (or bookmark) certain records that will be displayed separate from all other mobile CRM information. These key items can easily be retrieved and managed.

Mobile Architecture

With anything mobile, you need a way to transfer the data to and from the core online systems. With mechanisms such as Lease Key and Secure Data Transfers, your data is safe and secure.

Several deployment methods are available. You can deploy the GoldMine Mobile application via a cradle / USB for the device. The application also supports synchronizing directly from the cradle (known as cradle sync). This is a great deployment method and provides continuous data synchronization for users close to the office. But what if your mobile sales agent sales agents are rarely in the office? GoldMine Mobile technologies enable you to wirelessly deploy the application and initiate wireless synchronizations to retrieve the data thus saving you the time, money and headache every IT team faces when deploying a new application.

Not only can you deploy GoldMine Mobile wirelessly, you can also destroy the mobile application. Why would you want to destroy a mobile application, especially a mobile application with important client information on it? The answer is simple; just how many times have you, a co-worker or family member lost a device! Keeping the data secure through encryption, a secure login mechanism and out of the hands of unwanted users is vital to any mobile application user. GoldMine Mobile provides capabilities for you to keep your vital information safe and out of harm's way.

Users see the same information and system data whether in or out of the office, thus improving user adoption and helping drive more usage out of the core, online CRM system. GoldMine Mobile provides a way for you to configure your mobile CRM application with the same data sets, look and feel, and list of value entries. Since the data is encrypted and compressed during data synchronizations you save costs and time over the lifetime of your mobile CRM usage.

Because GoldMine Mobile leverages your existing GoldMine installation, the BlackBerry Enterprise Server® and BlackBerry smartphones, you don't need much else to go mobile. If you already have GoldMine installed you are half-way there. If you have an existing BlackBerry Enterprise Server and BlackBerry smartphone, you are almost all the way to leveraging the power of GoldMine Mobile.

Conclusion

Drive more return on investment out of your existing CRM deployment with GoldMine Mobile for BlackBerry. With the help of sufficient, wireless networks, natural mobile device evolution, and features designed for your mobile sales agents, you can now take GoldMine with you wherever you go, anywhere and at anytime. Place high value processes in the hands of the most important sales agent, sell across team members for the most effective sale, and most importantly provide the data your mobile sales agents need.

About FrontRange Solutions

FrontRange Solutions USA Inc. provides CRM solutions used by more than 130,000 companies and over 1.7 million users to automate and manage customer-facing initiatives. GoldMine is designed for businesses that want a complete and customizable solution that manages every aspect of the customer lifecycle with a quick time to benefit and low total cost of ownership.

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