

Bringing Enterprise CRM to the Small Screen

Many organizations are adopting wireless technologies for the potential competitive advantages they offer — a time tested process for technology adoption. But as we have seen before, technology is only half the issue. Wireless technology needs mobility strategy, an understanding of how people work regardless of where they are or which technologies they have at their disposal. This Beagle Research KeyFinding examines the needs of a mobility strategy.

This Beagle Research Group KeyFinding represents recent research in an important area of front office automation.

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The increasing mobility of the typical sales team is causing a great deal of rethinking about the systems that support them. Many industry observers have suggested that the sales force automation (SFA) platform of the future will look a lot more like a handheld device than a laptop, and for good reason.

Laptops, like their desktop cousins, require too much care and attention to be truly useful in the mobile world. Each must be started, may need AC power, and to be effective they also need access to the Internet. Handheld devices start quicker, run for long times without recharging, and they access the Internet without the complications associated with office-bound systems. They are therefore more likely to be used to check a fact or register a deal for the simple reason that they fit better into a mobile work life.

The improved computing power, memory, and versatility of the latest generation of handheld devices have focused a good deal of attention on the question of what applications mobile sales representatives need for maximum effectiveness in the field. The somewhat surprising answer is that in a modern enterprise, the sales department needs technology as well as a strategy that supports the needs of in-house users and those in the field with different applications.

Rather than providing field representatives with redundant copies of enterprise software on laptops, handheld systems require less—though different—functionality because they simply need to be able to provide information of immediate value to the user. For example, a sales representative may have little need for an entire database of the customer information he or she has collected over time on a handheld device but the same representative will be highly interested in quickly accessing information about the customers to be seen on a given day or business trip. Similarly, the ability to check related data such as a customer's payment history or outstanding support issues in real time is highly prized, as is quote generation—especially if it can be done without the latency associated with starting up a laptop.

Finally, there are applications available only on handheld devices that make little or no sense to the more desk-bound administrator or executive such as GPS location finders and integrated telephone services. The differences between enterprise and field SFA systems are thus increasing and organizations need what could be called a mobility strategy to bring together systems and users in both realms.

Infrastructure

A total mobility strategy at the enterprise level must recognize that users will need access to PC or laptop based systems, as well as mobile systems, and that they will access similar data but manipulate it differently. The implications here are significant. First, the enterprise system must be supported by a database capable of managing all of the information an organization captures and stores about a customer from basic sales and demographic information to financial data. Second, the system must support multiple different user interface standards including PC or Windows based applica-

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multiple different user interface standards including PC or Windows based applications and popular Web browser interfaces. Third, at the server level, the host system must be able to interface with mobile users supporting their often unique user interface and operating system standards such as the Blackberry and Pocket PC.

The last requirement is not as simple as having the ability to support multiple browsers for the small screen. Some organizations let their sales representatives select their phones and remote devices each of which may have different capabilities such as full key pads, while others support a corporate standard and there is no consistency about who pays for the devices. Consequently, mobile solutions must be able to support multiple device standards, operating systems and browsers from a single application definition.

Security and synchronization

In addition to infrastructure requirements, there are issues of security and synchronization that are handled differently in the desktop world. For example, handheld devices are liable to be lost, stolen, or misplaced and a full mobility strategy needs to include the ability to cut off a device from accessing the host system as well as the ability to destroy any confidential data on the device to keep that information from falling into the wrong hands.

Synchronization takes on added importance and complexity for mobile users. A mobile user will almost by definition not have continuous access to host systems and data and when connection is re-established the user will need to be updated on relevant changes. Ideally, data synchronization needs to be driven from two directions providing the user with the flexibility to “pull” data from the host when it is convenient as well as providing the central system with the capacity to “push” updates out to users as necessary.

Furthermore, synchronization should have some intelligence associated with it. As noted above, the handheld device might not hold all of the information a sales representative has ever collected and stored. Therefore, synchronization should focus on the records already on the handheld device unless the representative requests more from the host system.

The following section summarizes many of the key requirements for a mobility strategy.

Infrastructure

- Host system with full complement of front and back office information including sales, service, marketing, and customer financial information.
- Ability to serve native, browser-based, and handheld clients.
- Ability to support multiple handheld devices/operating systems from common code base.

Security

- Data encryption (128bit or better), password protection.
- Ability to destroy data on device if it is lost or stolen.

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Synchronization

- Push and pull synchronization capability and ability to store information when device is out of range.
- Ability to push application updates to devices as needed whether the device is in the cradle or in the field.

Applications

- Ability to view or add accounts and contacts, schedule and complete activities, take notes, and track opportunities, generate quotes, and review support tickets. Instant access to host database information.
- Searching, sorting, adding, and updating account, contact, opportunity, and activity records with quick look-ups or filtered search criteria.
- Search, sort and review support tickets.
- Access to virtually any information available in the host database.
- User-configurable forms to choose which columns to display. Sorting by any column in ascending or descending order.
- Calendar, contact, and email access integrated with host based systems.

Conclusion

CRM's initial strategy was one of supporting enterprise based business processes which required data gathering from the field. Unfortunately, that data gathering put a significant strain on field workers who often simply ignored the requirements and did their jobs as well as possible. More enlightened approaches along with better support from hardware, software, and infrastructure now make it possible to both collect data from the field in a more timely way and to project enterprise systems literally into the hands of sales representatives and others in the field.

Wireless devices have become more robust and are capable of supporting a wide range of activities that were once the exclusive domain of desktop or laptop computers. But hardware is insufficient by itself to provide a solution that will support the rapidly evolving front office business processes that often project the enterprise out to the field sales representative. A strategy that unites enterprise business processes with field based processes must recognize the different needs of each realm. By supplying applications and data to mobile users that satisfy their unique needs, companies can rapidly evolve mobility strategies that will drive compliance with enterprise standards and deliver the information that all parties need to succeed in today's competitive environment.

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