

Mobilizing Your CRM

Exploring the Benefits and Considerations

Whitepaper

Table of Contents

Situation Analysis..... 3

Business Scenarios..... 4

Key Issues for Consideration in Evaluating Potential Solutions..... 6

CWR Mobile CRM: The Leading Mobility Solution for Microsoft
Dynamics® CRM.....10

Mobile CRM Solution Requirements Checklist14

About CWR Mobility.....15



Situation Analysis

The Benefits of Mobilizing Your CRM

Forrester Consulting research amongst Western European (IT) executives lists the largest benefits of Mobile CRM:

1. Improved employee productivity
2. Improved customer experience
3. Higher customer satisfaction
4. Improved business process efficiency
5. Lower cost of CRM

The quality of your relationships with your customers is essential to running your business successfully. Recent global economic conditions have made it clear that staying close to your customers has never been more important. Customer Relationship Management (CRM) is a business strategy for putting customers at the center of your business, improving customer satisfaction and loyalty while reducing the costs of customer interaction. As companies carefully consider where to apply resources to drive their business forward -- whether to enhance relationships with existing customers, establish relationships with new customers, or find new markets and exploit new business models -- CRM software consistently remains a top priority area of investment.

To gain a competitive edge, companies which today rely on a distributed workforce need to ensure their mobile employees have instant, convenient, on-the-go access to customer and corporate data. It is essential that these companies equip their mobile professionals with technology that allows them to operate in the most productive and efficient way. Until recently, mobile staff did not have an effective mobile solution providing them valuable customer insight while on-the-go, at the customer site, or traveling.

Business Scenarios

Below are examples of scenarios that illustrate ways in which Mobile CRM can help enable distributed workforces in building and maintaining stronger customer relationships, with improved productivity, efficiency and lower costs. As you evaluate whether Mobile CRM is right for your organization, consider whether scenarios such as these are applicable to your business and could offer substantial benefit.



Field Sales

Distributors and industries such as Food & Beverage require tools to enable field sales teams to manage inventory, orders, payments and customer interaction. Salespeople need access to up-to-date account information prior to visiting a customer site, access to product information, price lists or offers when meeting with customers, and the ability to capture or update customer information, initiate orders or update sales forecasts promptly, without returning to the office.

Field Service

Consumer Packaged Goods and Hi-Tech companies use field teams for on-site service with custom needs around customers, parts and warranties, and payment processing. Prior to visiting a customer site service technicians need access to customer account details, service contracts, warranties and service history. While meeting with customers service technicians need product and support information as well as the ability to track, manage, schedule or escalate service requests in real-time.

Field Marketing

Industries such as Pharmaceuticals leverage large field teams for in-person marketing and require tools for education, readiness and

customer engagement. Additionally, marketers may need to qualify, assign or analyze leads or push through budget requests or approvals anywhere, anytime.

Financial Services

Banking, insurance and financial advisory companies employ highly skilled professionals with needs for deep customer, account and transaction capabilities.

Professional Services

Legal, Accounting and Construction are examples of industries with special needs to handle time tracking, billing, orders, material use and customer engagement.

xRM

Companies need to extend and mobilize their custom/xRM applications to empower users to complete essential company processes when offline or remote.

Key Issues for Consideration in Evaluating Potential Solutions

As you assess how Mobile CRM can help your organization, it is important to identify the key issues to consider as you evaluate a potential solution. As an organization that currently uses (or is evaluating the use of) Microsoft Dynamics CRM, potential solutions should be evaluated in terms of how well they will complement your CRM environment, from the perspectives of your end users as well as your IT organization.

HOW FAMILIAR WILL IT BE?

Users Need to Recognize Their CRM System on Their Mobile Device

Mobile professionals are focused on their business mission; technology and tools succeed to the degree that they help them in achieving their mission. The ideal solution will deliver a user experience that is immediately familiar to end users, having the same interface and features as their office CRM.

We Need to Leverage Our IT Investments

IT managers and system administrators are always challenged to balance between empowering users with the best IT solutions and keeping their IT infrastructure secure and manageable. They are looking for solutions that are integrated seamlessly into their current IT infrastructure, are scalable, secure and easy to implement and maintain. The ideal solution should leverage the investments in infrastructure and security your organization has already made.

Can a Single System Support a Choice of Devices?

The reality in many of today's organizations is that mobile professionals are using a diverse range of mobile devices and this represents a considerable challenge for IT departments. The ideal solution should enable your employees to use any mobile Internet-capable device they want, whether smartphone or tablet, including devices they already own like an iPhone[®] mobile digital device, iPad[®] mobile digital device, BlackBerry[®] smartphone, Android[™] mobile device, or Windows[®] Phone mobile device. This ensures cost efficiency and a seamless transition to your Mobile CRM solution, since employees are more motivated to use a familiar device. Finally,

rather than providing a generic layout for all devices, the ideal solution should adapt to the look and feel of the device at hand, as users expect.

HOW INTELLIGENT WILL IT BE?

Can a Single System Provide an End User Experience That Adapts to User Roles?

Your mobile professionals have different roles and functions. The ideal solution should provide the specific information they each need to effectively perform their role, without any additional effort on their part. In this way, account managers will have instant mobile access to all their clients and contacts, sales leads and opportunities, orders and quotes. At the same time, a service engineer working for the same company and using the same application will have custom access to all relevant information regarding repair assignments, parts, service contracts, etc.

We Need a Flexible Solution That Can Adapt to Our Size, Our Market

When looking for assistance in professionalizing their mobile workforce, organizations want to enable their field employees to benefit from up-to-date business information and optimize their response to changing situations or emerging opportunities. The ideal solution will enable this regardless of company size (from a handful to thousands of employees) or vertical markets (from banks and insurance companies to field service and pharmaceuticals),

The Mobile CRM solution should enable vertical solutions to be designed in close cooperation with partners who provide the specific knowledge to develop industry-based solutions. In this way, the resulting solution can adapt to your company and its business processes, adopting any mobile business model.

Finally, the ideal solution should work with your existing CRM system, simplifying adjusting the application to new and changing situations and eliminating the need to hire programmers to make necessary modifications.

Is Mobilizing xRM a Need?

xRM, eXtended Relationship Management, is a strategy that goes beyond traditional customer-centric CRM, by focusing on managing

all relationships, not just those with customers. The “x” underpins a variety of tightly integrated applications which are used to manage internal and external transactional relationships. xRM provides a comprehensive, unified system for all aspects of business. The ideal solution should enable you to mobilize any xRM application, whether it is for HR recruiting and staffing, procurement/vendor management or any other internal Line of Business application.

How Much Complexity is Involved?

Does the Mobile CRM solution rely on third party or external middleware or applications? The ideal solution will avoid requirements like these, minimizing complexity and potential impacts to deployment timeframes.

Fast ROI is a Necessity

Return on Investment (ROI) is always an important focus for new investments, but recent economic conditions have caused IT budgets to tighten even further. The ideal Mobile CRM solution needs to deliver a fast ROI.

HOW CONNECTED WILL IT BE?

Does It Support Online and Offline Operation?

The ideal solution should make information accessible and editable whether users are online or offline as, by definition, mobile professionals are on the go, whether in the field or on an airplane. Despite today’s advanced cellular infrastructure, mobile professionals regularly find that they roam outside of the coverage area, are in buildings which block coverage (hospitals, parking garages, etc.), or are traveling on airplanes with no coverage. Mobile professionals find that they require data stored locally on their mobile device which provides fast and continuous access to all of their CRM data.

Will It Support All of Our Users’ Mobile Platforms?

The ideal solution should support any mobile device hardware, whether in use in the field or within the IT department.

Can the Solution be Deployed On-Premise or Hosted?

The ideal solution should offer you flexibility in your deployment strategy, enabling you to meet your organization’s objectives in key areas such as deployment timeframe, manageability, security and cost-efficacy. So, regardless of whether you deploy your CRM

system on-premise or have it hosted in the cloud, you will want to have a mobile platform that supports all deployment models (and can easily switch if your IT strategies or plans change).

CWR Mobile CRM: The Leading Mobility Solution for Microsoft Dynamics® CRM

CWR Mobility's flagship product, CWR Mobile CRM, is the leading mobility solution for Microsoft Dynamics CRM. CWR Mobile CRM works with Microsoft Dynamics CRM to deliver the power of productivity through familiar, intelligent, and connected experiences.

As a smart client application for mobile employees, CWR Mobile CRM leverages the power of the Microsoft Dynamics CRM system and the advanced connectivity of mobile Internet-capable devices, whether smartphone or tablet, to give employees all the information they need in the palm of their hand. Employees can use devices such as a Windows Phone mobile device, iPhone mobile digital device, iPad mobile digital device, BlackBerry smartphone, or Android mobile device. CWR Mobility's solution enables rapid deployment of the Microsoft Dynamics CRM product to mobile professionals with wireless handheld devices. Because it is based on the Microsoft Dynamics CRM platform, it is an extension of your organization's CRM system. CWR Mobile CRM is feature-rich and easy to use, which translates into faster adoption and lower training costs.

CWR Mobile CRM enables mobile professionals to communicate bi-directionally and in real-time with their back office. The product provides them with instant access to accurate CRM data in the field, including all standard and custom entities from Microsoft Dynamics CRM. CWR Mobile CRM includes default implementations for Field Sales and Field Service professionals. In addition, it contains a flexible toolkit for building custom Line of Business applications.

In order to make deployment and data synchronization as efficient as possible, the system is designed to give mobile users role-based access to all information relevant to them. CWR Mobile CRM works online as well as offline in areas without coverage. The mobile client automatically synchronizes information whenever connected to the server.

CWR Mobile CRM is a stable, scalable and reliable product with proven functionality in some of the most demanding IT environments. The solution is multi-currency, multilingual and multi-tenant.

A FAMILIAR EXPERIENCE

Seamless Integration

CWR Mobile CRM is the most advanced, multi-platform mobile CRM solution in the market, built from the ground up, in, with and for Microsoft Dynamics CRM. It incorporates the familiar look and feel of Microsoft Dynamics CRM, delivering an interface and features that mobile users immediately recognize as their office CRM system.

CWR Mobile CRM is managed entirely within Microsoft Dynamics CRM; therefore, it does not require a separate management console or application. Administrators define the application layout, accessibility and rights from a centralized location inside Microsoft Dynamics CRM. Server installation and management is straightforward, with the IT department keeping the database synchronized. CWR Mobile CRM is based on the proven Microsoft Dynamics CRM platform, allowing customers to simply add our solution to the existing IT infrastructure. It leverages the investments in infrastructure and security your organization has already made, as well as your organization's Microsoft skills and experience.

Ongoing development is focused upon keeping CWR Mobility the leading supplier of mobile CRM solutions. We have already installed it at hundreds of companies. Its proven technology is secure to the highest standard.

Choice of Devices

CWR Mobile CRM is completely platform independent. Your employees may use any mobile Internet-capable device they want, whether smartphone or tablet, including those they already own such as a Windows Phone mobile device, iPhone mobile digital device, iPad mobile digital device, BlackBerry smartphone, or Android mobile device.

AN INTELLIGENT EXPERIENCE

Adapts to User Roles

Unlike the majority of mobile CRM software, the screen content of CWR Mobile CRM completely adapts to a user's specific role without any programming, just by rearranging the user interface, WYSIWYG-style. CWR Mobile CRM uses Profile-based Deployment, meaning custom data will be deployed to the mobile device based on a user's

role within your company. Depending on their profile, a specific layout is sent to the device.

Any Size, Any Market

CWR Mobile CRM is designed to fit your business, large or small, across a broad range of industries. Vertical solutions are designed in close co-operation with our partners, who provide the specific knowledge to develop industry-based solutions. In this way, our flexible software completely adapts to your company and its business processes, adopting any mobile business model.

This also simplifies adjusting the application to new and changing situations. CWR Mobile CRM uses the flexible point-and-click customization of Microsoft Dynamics CRM to adapt to changing needs. It dynamically updates and self-configures when new forms or processes are deployed. Support of the Microsoft Dynamics CRM platform ensures no new or additional software has to be purchased, and there is no need to hire programmers to make necessary modifications.

Mobilizing xRM

CWR Mobile CRM is the flexible mobile platform that supports virtually every mobile relationship management scenario, thereby enabling complete, custom interaction between companies and people.

Minimizes Complexity

CWR Mobile CRM does not require any third party or external middleware or applications, minimizing complexity and eliminating dependencies on other components that have the potential to impact deployment timeframes.

Impressively Fast ROI

The impressively fast ROI of CWR Mobile CRM (3 to 6 months) is based on its flexibility and adaptability. The use of mobile CRM software in itself already results in increased productivity and data quality. Additionally, by taking advantage of your existing CRM infrastructure, new investments will be relatively small, resulting in an even faster ROI.

A CONNECTED EXPERIENCE

Online and Offline

With CWR Mobile CRM, all information is both accessible and editable when users are online or offline. In remote areas without internet access, users will still have the most up to date information at their disposal. As soon as online access is available again, the application's local database will be automatically synchronized with the server.

Multi-platform Support

The application is multi-platform. Any mobile Internet-capable hardware already available -- both within the IT department and in the field -- whether smartphone or tablet, such as an iPhone mobile digital device, iPad mobile digital device, BlackBerry smartphone, Android mobile device, or Windows Phone mobile device, may be used by our software. CWR Mobile CRM software is available for download at all major application stores. Users simply install the application in as little as 15 minutes on their mobile device, either via the application store or upon receipt of a download link by email.

Power of Choice in Deployment

CWR Mobile CRM licenses may be deployed On-Premise (Standard or Professional Edition) or Hosted (Online or Partner Hosted). In Europe, CWR Mobility is working with several Microsoft Dynamics CRM hosting partners, offering CWR Mobile CRM software as a service. Additionally, CWR Mobile CRM is available online as an extension to Microsoft Dynamics CRM Online, a Microsoft hosted platform.

CWR Mobile CRM: The Power of Close™

Mobile CRM Solution Requirements Checklist

Below is a requirements checklist to assist in your evaluation of potential solutions.

REQUIREMENT	CWR Mobile CRM	Solution B	Solution C
FAMILIAR EXPERIENCE <ul style="list-style-type: none"> Entirely built in, with and for Microsoft Dynamics CRM Incorporates familiar Microsoft Dynamics CRM look and feel Single deployment supports iPhone mobile digital device, iPad mobile digital device, BlackBerry smartphone, Android mobile device, or Windows Phone mobile device. Application runs as a native application and also has a custom user interface on each mobile platform Managed entirely within Microsoft Dynamics CRM; does not require separate management console or application. Leverages all of our Microsoft skills and experience 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ 		
INTELLIGENT EXPERIENCE <ul style="list-style-type: none"> Delivers customized information to end users based on their specific organizational roles Uses Microsoft Dynamics CRM flexible point-and-click customization to adapt to changing needs Dynamically updates and self-configures when new forms or processes are deployed Enables rapid deployment of custom line of business or xRM applications No third party/external middleware or applications required Fast ROI 	<ul style="list-style-type: none"> ✓ ✓ ✓ ✓ ✓ ✓ 		
CONNECTED EXPERIENCE <ul style="list-style-type: none"> Offers online and complete offline access for end users Supports all of our users' mobile platforms Operates on-premise or can be easily hosted by Microsoft (Microsoft Dynamics CRM Online) or a partner 	<ul style="list-style-type: none"> ✓ ✓ ✓ 		

About CWR Mobility

Our mission at CWR mobility is to help organizations gain *The Power of Close* -- the power to get closer to customers and stay there, increase customer satisfaction and loyalty while reducing the costs of customer interaction, and create a more agile and effective customer-facing organization.

We are an Independent Software Vendor and the leading provider of mobile CRM solutions. By offering the most advanced, multi-platform mobile CRM solutions -- based on the Microsoft Dynamics CRM platform -- CWR Mobility continues to set the mobility standard for the entire CRM industry. We are committed to continuously taking Mobile CRM to the next level, enabling customers and partners to capitalize on the latest technology trends to make the most out of their businesses.


We have developed a partner network that already spans Europe, the Middle East and Africa, The Americas, Asia and Australia/New Zealand. Together with our partners we are delivering horizontal and vertical mobile CRM solutions to Enterprise and SMB companies in every corner of the globe.

Microsoft Gold Certified Partner

CWR Mobility is a Microsoft Gold Certified Partner with competencies in Microsoft Business Solutions, Mobility Solutions and ISV/Software Solutions. CWR Mobile CRM is a Microsoft Certified Solution for Microsoft Dynamics CRM.

Two-Time Global Partner of the Year Award Winner

For two consecutive years running, in 2010 and again in 2011, CWR Mobility has received Microsoft's highest global award for mobile solutions, Mobility Business-to-Business Application Partner of the Year.



CWR Mobility B.V.

Europe and International

Kerkenbos 10-15F
6546 BB Nijmegen
The Netherlands
Tel. +31 (24) 371 1172

United States

Redmond, Washington
Tel. +1 (210) 767-3297
www.cwrmobility.com
info@cwrmobility.com

The Power of Close is a trademark of CWR Mobility B.V. Microsoft, Windows and Microsoft Dynamics are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. Apple, iPhone and iPad are trademarks of Apple Inc., registered in the U.S. and other countries. The Trademark BlackBerry is owned by Research In Motion Limited and is registered in the United States and may be pending or registered in other countries. CWR Mobility BV is not endorsed, sponsored, affiliated with or otherwise authorized by Research In Motion Limited. Android is a trademark of Google Inc. Use of this trademark is subject to Google Permissions. Other trademarks held by their respective owners and/or its suppliers.

© Copyright 2011 CWR Mobility B.V.