

Mobile First CRM

*Capitalizing on the New Normal to Create
Customer-Centric Business Processes
that Drive Your Business Forward*

Whitepaper



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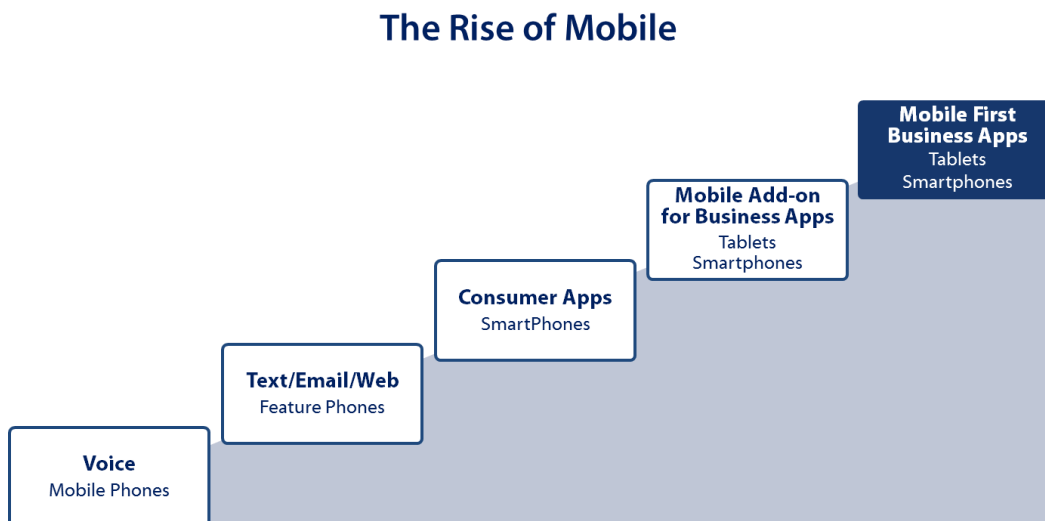
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The Rise of Mobile in Business

Mobile technology has rapidly evolved in recent decades. Consider the confluence of the evolution of these key technologies:

- Networking: analog / digital/2G/3G/4G cellular networks / WiFi
- Mobile devices: laptop PCs / feature phones / smartphones / tablets
- Interaction models: keyboard & mouse/touchpad / stylus / touchscreens
- Processors and storage: lower power processors, solid state storage
- Mobile platforms: BlackBerry®, Windows® Mobile, Symbian®, iPhone®/iPad®, Android™, Windows Phone, Windows 8

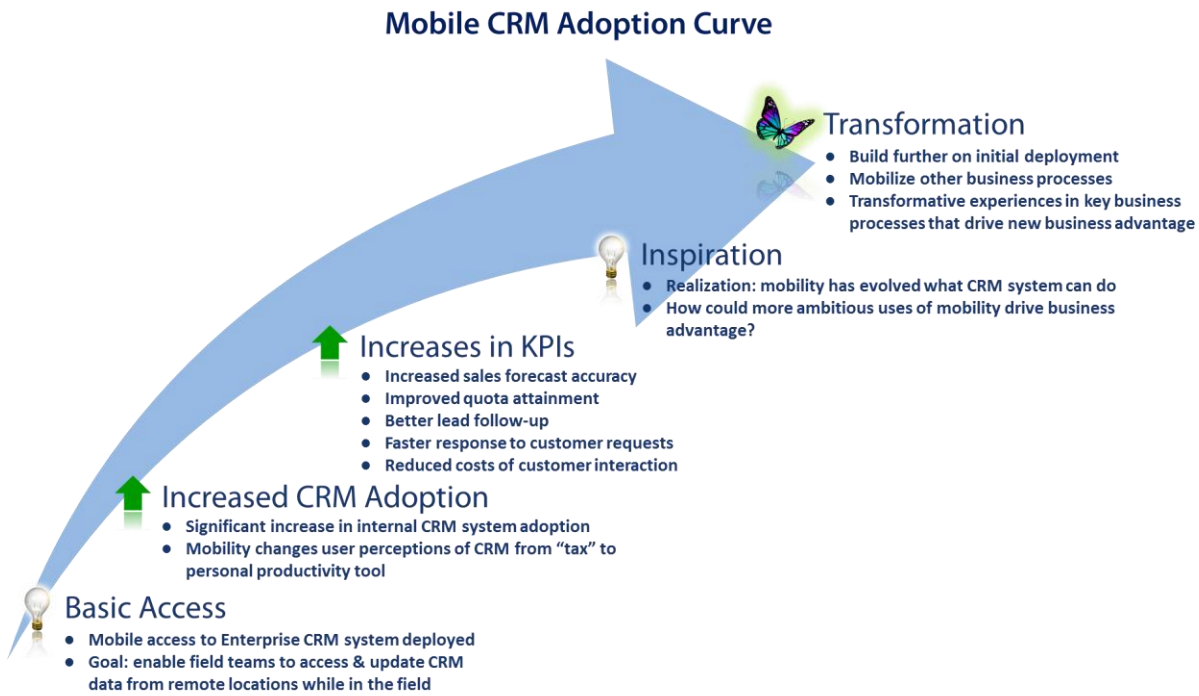
This rapid advance of mobile technologies has led to an ever more powerful set of business usage scenarios, beginning with basic voice communication, then adding text, email and Web browsing functions, then consumer applications and, in recent years, add-ons to business applications.



As the explosive adoption of mobile devices accelerates, Mobile is moving beyond its role as an add-on for key business applications. Leading companies are now looking to deploy modern, customer-centric business processes as mobile experiences first--and desktop or Web experiences second.

Example: The Mobile CRM Technology Adoption Curve

In the seven years that CWR Mobility has been helping private and public sector organizations around the globe implement mobility solutions for CRM, we have observed a clear technology adoption curve for Mobile CRM technology. Taking their first step into Mobile CRM, these organizations have found that Mobile CRM provides much more than just mobile access, it rapidly demonstrates levels of business benefit that not only impress, but inspire the organization to think about how expanded use of mobility can lead to business transformation.



Basic Access

Many CWR Mobility customers start out with a straightforward goal: improve the efficiency of their field teams, whether sales, service or marketing. To achieve this goal they deploy CWR Mobile CRM to provide basic access to the company’s Microsoft Dynamics® CRM system from mobile devices in use by field personnel. As the initial deployment rolls out, the IT organization is often greeted with an enthusiastic response from users as they find themselves able to access customer records and take action while out in the field or on the go, without having to return to the office. This response tends to occur whether the organization’s IT strategy is to support BYOD (Bring Your Own Device) or device Standardization.

Increased CRM Adoption

At this point, companies often experience a pleasant surprise: a significant, sometimes dramatic, increase in internal adoption of their CRM system. As word gets around and increasing numbers of mobile personnel find that CRM on their devices turns CRM into a personal productivity tool that helps them get their job done, their prior perception of CRM as a “tax” evolves.

Increased KPIs

As CRM utilization climbs, field team effectiveness improves in many ways, as field teams find they are:

- More prepared going into customer calls, armed with up-to-the-minute account status, such as progress on outstanding requests, order status and support incident resolution
- Able to take action in front of the customer, in real-time
- Able to pivot during a customer meeting and provide real time information in response to new inquiries not on the original meeting agenda
- Able to follow up immediately after the meeting, while still onsite (e.g. in parking garage), and be done when they head home or drive on to their next customer call. Follow-up can include actions such as updating contact info and account status, sending literature, scheduling a service call, scheduling a follow-up meeting, initiating orders, and updating their sales forecast

These are all examples of productivity, efficiency and effectiveness improvers that eventually result in concrete improvements in critical Key Performance Indicators (KPIs). Companies often see notable improvements such as:

- Improved follow-up on sales leads
- Improved sales forecast accuracy
- Increased quota attainment
- Reduction in customer request/response cycle time
- Over time, reduced costs of customer interaction

Inspiration

Organizations tell us that during these initial phases of Mobile CRM deployment and adoption they reached a key realization: Mobile CRM transforms the CRM user experience, transcending the desktop user experience. Mobile CRM is more than just access to the CRM system...it *evolves what their people can do with their CRM system*

Having gained important insight on what Mobile CRM makes possible, companies often become inspired by the potential they see. They begin to think about more ambitious uses of Mobile CRM, such as deploying mobilized enterprise LOB applications.

Transformation

The industry has now arrived at the place where Mobile has become *the new normal*. Organizations that do not conceive and deploy business processes or new applications with a mobile experience first risk lagging the market and falling behind their competitors.

Mobile Businesses Win

Today, organizations are moving rapidly to incorporate tablets and smartphones throughout key business processes. While this movement has its origins in the IT consumerization wave, mobilization of business processes is accelerating in response to demonstrable business benefits.

For example, sales force automation has been an early focus of many organizations deploying Mobile CRM. [As reported on CRMsearch](#), in 2012, Nucleus Research reported that in a survey of CRM decision makers it found that providing sales people with mobile device access to CRM drives a 14.6 percent productivity increase. Significantly, 3 in 10 mobile CRM users said productivity improved by more than 20%.

Mobilized business processes hold the potential to enable companies to deliver new products and services, increase the efficiency and effectiveness of personnel and processes, and to do all of this while reducing costs. Broadly categorized, the areas where businesses can achieve significant gains include empowering their organizations with greater insight, achieving superior business agility, and more ably winning, servicing and securing relationships with customers. Put simply, mobile businesses win.

Insight

Relevant & Timely Information

Mobility empowers the workforce by delivering relevant and timely information to the point of interaction with customers and partners. In addition, field teams can more easily and readily provide important intelligence back into the organization, making it available at the point of decision.

Data-driven Decision Making

Whether on the part of a customer, partner, or Management, a mobile-enabled organization more readily enables decisions to be made based on data. This enables the organization to make better decisions.

Common Understanding of Success

Mobile-enabled business processes such as CRM-driven sales force automation and field service processes enable organizations to gain a shared view of status and coordinate the actions of diverse teams across the organization through an integration of CRM, collaboration and mobility technologies.

Agility

Mobilize to Take Advantage of New Opportunities

Mobile-enabled business processes allow an organization's workforce to move rapidly to capitalize on new opportunities. Rapid mobilization drives rapid learning, which in turn drives better results.

Outmaneuver Your Competition

Mobile-equipped businesses can mobilize faster and better than competitors to capitalize on opportunities.

Adapt with Changing Market and Customer Needs

Mobile-equipped businesses are better able to track and adapt to market and customer needs as they evolve over time, ensuring they maintain leadership in their target markets.

Customer Relationships

Most importantly, mobilized business processes enable organizations to better build and maintain superior relationships with customers and partners, staying connected with their changing and demanding needs. Use of mobility leads to a much greater degree of customer intimacy, as interactions with customers are fueled with deeper and more targeted information, offers and actions at the places and times they are needed.

Know Your Customer the Best

Mobilized business processes enable organizations to more easily capture, record and track customer preferences, needs and directions.

Anticipate Evolving Customer Needs

Mobilized business processes enable easier synthesis of evolving needs, whether of an individual account or an entire industry sector.

Drive Credibility and Satisfaction

Ultimately, mobilized business processes can provide the means to ensure that field personnel are better equipped to serve customers and partners. This in turn can help an

organization better achieve credibility with customers and partners and, ultimately, drive high customer satisfaction, securing these relationships. Secure customer relationships and the high customer satisfaction that drives them can lead to outstanding business performance. As a March 2007 [Harvard Business Review article](#) reported, a ground-breaking 2006 study illustrated the relationship between customer satisfaction and financial success: companies with high customer-satisfaction scores dramatically outperformed the S&P 500.

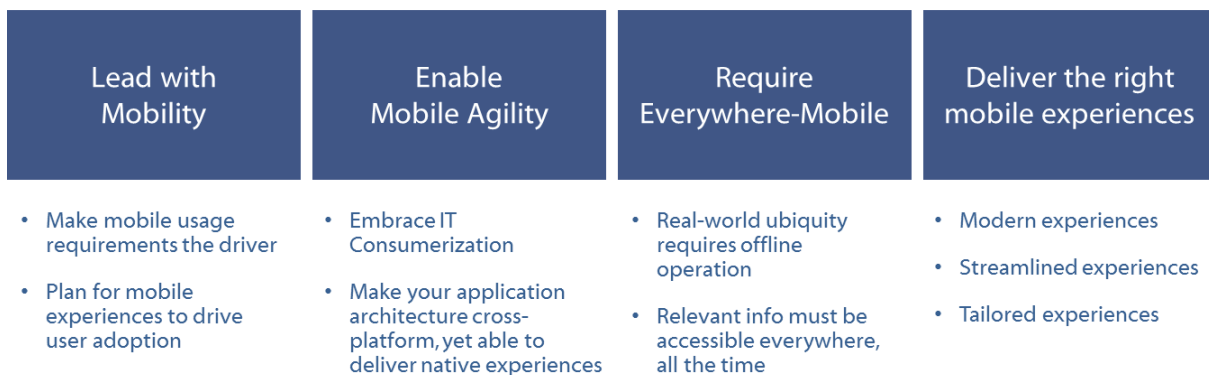
Mobile First: An Essential Technical Strategy in the New Era

The convergence of a powerful set of new technologies – Mobile, Social, and the Cloud -- is powering a rapid modernization of business processes and dramatically evolving the development and deployment of the applications that embody them. In a business climate in which Mobile has become the new normal, IT Organizations can play a critical role in ensuring that their business achieves strategic value from the use of these technologies.

Through the adoption of a Mobile First strategy for enterprise CRM applications, IT organizations can help their business embrace and integrate mobility into existing or new customer-centric business processes in ways that help the company gain significant business advantage and ensure senior management support.

IT organizations can adopt a Mobile First strategy for Microsoft Dynamics CRM applications comprised of four pillars:

Mobile First Strategy



1. Lead With Mobility

Make Mobility a top business and IT priority, and move mobile usage scenarios and requirements to the front for enterprise CRM applications.

Myths

- Mobile is still mostly for specialized roles such as field sales and service
- Mobile is an add-on

Make Mobile Usage Requirements the Driver

Going forward, mobile usage requirements must drive the design of CRM-based enterprise applications. While desktop and Web continue to provide important anchor user experiences, it will be mobile-deployed customer-centric business processes that separate and create competitive advantage among businesses. This trend is being driven by the pervasive possession of smartphones by employees, and further amplified by the aggressive adoption and deployment of tablet devices throughout enterprise organizations.

While the need for mobile usage began in customer-facing roles such as field sales and service, it has rapidly evolved beyond specialized scenarios; whether in a meeting, moving around a corporate campus, or on the go, businesses are now seeing the benefits of expanding mobile usage to enable general employees to access key business processes anywhere, any time.

The reality is that Mobile has become the new normal, and leading with mobility will enable you to capitalize on this trend rather than being forced to react to it.

Plan for Mobile Experiences to Drive User Adoption

As part of this trend, mobile experiences are moving to the front and will become the greatest driver of user adoption of customer-centric business processes. Leading with Mobility can help you ensure maximum user adoption of new applications rolled out by your IT organization, thereby ensuring support of key senior management stakeholders and setting the stage for achieving maximum business impact.

Key Questions to Consider

1. Where is your organization on the mobile adoption curve?
2. Where do you think your competitors are on the mobile adoption curve?

3. Is your organization moving fast enough to embrace mobility and move it to the front?
4. In your organization currently, can a new enterprise application be rolled out without delivering a mobile user experience in the first deployment? Should this be the case?

2. Enable Mobile Agility

The capabilities of mobile devices and platforms and their market dynamics continue to evolve rapidly; plan for this as you consider deploying enterprise CRM applications.

Myths

- IT Consumerization is either a fad that will pass or a trend to be avoided
- Standardizing on a single mobile platform is the easy solution, because it means an IT organization doesn't need to plan for potential moves to other mobile platforms
- Web apps provide a sufficient solution to insulate organizations from the complexity and rapid evolution of mobile platforms and devices

Embrace IT Consumerization

“IT Consumerization” refers to the recent trend in which new information technologies tend to emerge first in the consumer market, then eventually migrate into the business market as employees look to use the consumer technologies they've adopted for professional purposes. Often associated with Mobile, Social and Cloud technologies, IT Consumerization has emerged as a major shift within the IT industry.

Given the rapidly accelerating pace of technological evolution businesses can benefit tremendously by embracing IT Consumerization, determining how and where it can help them rapidly deploy new mobile-enabled business-processes that deliver new products and services or capture new efficiencies, while doing so in more cost effective ways.

Along with the significant benefits it offers, IT Consumerization also presents new challenges for IT, such as efficient management of large numbers of mobile devices, potentially comprising multiple mobile OS platforms, and ensuring that corporate data is secure. As your IT organization evaluates mobile solution platforms, be sure to make these criteria part of your requirements checklist.

Make Your App Architecture Cross-Platform, Yet Able to Deliver Native Experiences

Essential to successfully embracing IT Consumerization are the architectural decisions that an IT organization makes regarding its enterprise mobile infrastructure.

To implement a mature approach to mobile infrastructure, IT organizations should focus on establishing an architecture that enables *Mobile Agility*, the ability to insulate the organization's business processes from changes in underlying mobile platforms -- while simultaneously enabling the business to capitalize on the rapid advances of mobile platforms.

This suggests the adoption of a mobile application architecture that is cross-platform, yet enables the delivery of the native mobile experiences that business users demand, experiences which meet their needs in terms of mobile platform familiarity and performance. Whether your mobile device strategy is BYOD (Bring Your Own Device) or Standardization on one or more specific mobile platforms, this mobile application architecture choice will put your organization in the best overall position going forward.

Key Questions to Consider

- Does your IT organization have a mobile application architecture?
- Does your mobile application architecture enable the simultaneous support of multiple mobile device platforms? Does it provide an efficient model for doing this?
- Does your mobile application architecture enable you to deliver rich user experiences that take advantage of a native mobile platform?

3. Require Everywhere-Mobile

To take advantage of Mobile everywhere, the enterprise CRM applications you deploy must function everywhere.

Myths

- A web app experience is sufficient to meet the needs of mobile users
- Mobile Internet access is so pervasive that offline support is unnecessary
- 4G/LTE wireless is so fast that it makes offline support irrelevant
- Offline is a "nice-to-have"

Real World Ubiquity Requires Offline Operation

Imagine that the mobile business application that you envision creating to implement a key business process is the equivalent of a cash register terminal in your retail store. Whenever the cash register terminal is down cashiers have to save transaction records locally (for example, saving receipts or the cash register tape), then synchronize later to ensure transactions end up being recorded accurately. While most businesspeople would agree that this is an undesirable scenario in an isolated case, imagine this happening across every cash register in a regional chain of stores.

Here's the key question: *how often could your business afford to have this happen?* The answer will help you decide how important offline operation is to the CRM application that will drive your business process.

As organizations around the globe have learned through hard-won experience deploying mobility, mobile solutions need to enable employees to remain productive *everywhere*. This means that connectivity-independent operation (offline as well as online) is a requirement of a mature mobile solution. This may continue to be the case for quite some time. Skepticism is warranted regarding vendor claims that Web technologies (such as HTML5 alone), which usually lack offline support and require a live internet connection, will meet your organization's needs, that "Offline is more of a nice-to-have", or that high-speed cellular technology such as 4G/LTE will soon make offline operation irrelevant. In the real world, mobile solutions must support ubiquity, and this means that offline operation is an essential requirement.

Relevant info must be accessible everywhere, all the time

Even in the world's most developed cellular markets, employees on the move face many scenarios every day in which they lose cellular connectivity. Whether visiting a customer in a location where electrical interference must be minimized (e.g. medical facility or factory), a shielded office building, a rural location or just making updates in the car in an underground parking garage at a customer site following a customer visit, your employees need a solution that supports offline operation.

Even if offline scenarios represent minority usage cases for your employees, making offline operation a checklist requirement in a mobile application architecture evaluation to put your business in the best possible position makes sense. Your strategy should ensure that "offline" doesn't mean "downtime."

Key Questions to Consider

- How important is offline operation for your intended usage scenarios?
- If your users were offline 10% of the time, what would be the level of business impact? What if they were offline 30% of the time?
- Should offline operation become an essential requirement of your mobile application framework for CRM applications?

4. Deliver the Right Mobile Experiences

To achieve maximum business impact, focus not just on delivering a mobile experience, but on delivering the right mobile experiences – experiences that help various roles within your business get their jobs done in new and more efficient ways.

Myths

- Recreating the desktop experience on mobile devices will be sufficient to meet your employees' needs
- Having to think specifically about mobile experiences isn't worth it

Mobile Experiences Must be Modern, Streamlined and Tailored

[As reported on CRMsearch](#), according to Nucleus Research regarding their 2012 study of the addition of mobile device access to CRM, companies which achieved the least success when deploying mobile CRM were those that simply migrated existing desktop CRM processes to a mobile device, whereas those who reimagined how to take advantage of the unique capabilities of particular mobile devices achieved greater success.

Capitalizing on Mobile to create business advantage requires focus on delivering mobile application user experiences that enable new productivity gains for your organization's diverse workforce.

- **Modern Experiences.** Mobile application user experiences should leverage the approach of consumer-styled applications; be visually compelling, elegant and effortless to use.
- **Streamlined Experiences.** Mobile application user experiences should be streamlined and uncluttered. The objective is to include targeted features and capabilities that meet the specific needs of a mobile usage scenario rather than simply force-fitting a desktop or web user experience into a mobile form factor.

- **Tailored Experiences.** Mobile application user experiences best fulfill their purpose when they are tailored to the role and tasks of a specific employee role. These experiences should contextualize information for the user – present information in the appropriate context in which the user needs to consume it – to help the user get their job done. Since organizations are comprised of a diverse range of roles, it will be advantageous to choose a mobile solution that can easily enable a range of tailored experiences.

Key Questions to Consider

- When on the go, do your users really need all of the features and functions from their desktop CRM application? Would they be better off with fewer capabilities better suited to an on-the-go usage scenario?
- How could you envision the capabilities delivered by mobile experiences varying between different roles within your company?
- What features and functionality specific to mobile devices could your users really benefit from when on the go that would either not be available or not make sense to be available in a desktop user experience?
- Will your users adopt the app? What will the mobile experience need to deliver to drive successful adoption?

Conclusion

Mobile, Social and Cloud technologies are rapidly converging in a way that is creating a sea-change for businesses and IT. Determining whether, when and how to capitalize on these technologies presents a key near term decision for many businesses, particularly as they strategize about how to achieve greater customer centricity.

This presents your IT organization with an essential and strategic role to play in ensuring that your business gains strategic advantage from the effective use of these new technologies.

Adopting a Mobile First strategy for enterprise CRM applications presents your business with the opportunity to rapidly offer new products and services and outmaneuver competitors through greater insight, superior agility and winning relationships.



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