

EBOOK

Blow Away the competition with Mobile CRM

Let technology give you a helping hand



EXECUTIVE SUMMARY

In a metrics and results-driven business like sales, tracking and analysing your teams' activity is crucial to improving overall performance. However, with sales staff increasingly mobile and away from the office, how do you find out what your employees are doing, and how they are performing?

So imagine being able to get live data on what your sales team is up to. Knowing who is selling effectively but could do more, who is suffering from serial "bad luck", who needs to raise their game and who simply needs a raise. Imagine having the data required to identify the strengths and weaknesses of your sales strategy, to highlight the black holes in your sales activity and understand what you can do to boost your sales figures. This is what mobile CRM offers, and this whitepaper will look at how it can help sales directors and manager's overcome the challenges they face in knowing how their teams are performing, how they can gain true insight into activity in the field and what they can do with the additional information they can access.



YOU DON'T KNOW WHAT THEY'RE DOING

Do your field sales representatives view your office based CRM as a burden? Do they see taking time between meetings to boot up a laptop and key a report into the CRM system as time wasted? Time that could be spent doing what they do best – selling? Furthermore, are they doing all their CRM reporting at the end of the day, or the end of the week, month or even quarter? If the answer to these questions is yes, then the data available to you is almost certainly outdated, incomplete and of depreciated value.

Increasing Sales with Mobile CRM in the Auto Trade

A major car part supplier in London was using basic paper forms for its sales reporting, which was time-consuming for staff to fill out and hard to analyse. Sales managers and directors had to spend a lot of time collating the forms and because sales representatives often didn't provide detailed reports, the company did not have accurate and up-to-date information about customer visits. As a result, hundreds of customers were not getting the regular visits needed to maximize sales because the company simply didn't have any way of monitoring and tracking visits, severely hampering their sales effort.

ForceManager provided the dealership with an automated and efficient solution for mobile sales management. Because the application automatically records every interaction between sales representatives and customers, the company has a much clearer picture of sales activity and can easily identify customers that have not been visited recently. ForceManager also worked closely with the customer to develop and tailor the system for the needs of an automotive dealer, enabling sales staff to access information such as how many ramps a garage has and what supplier they currently use – information that is useful to them and specific to their industry. This extra knowledge enables them to spend more time selling relevant and appropriate items instead of constantly scoping and re-scoping the potential opportunities.

Why? Because it means that you have had limited resources with which to assess the performance of your field sales force. To compound the issue, salespeople on the road have not had access to the same CRM resources as the office-based staff, leaving them with less customer information to help them do their job. The result is that field sales teams have largely been left to rely on their own skill to nurture relationships while you have had limited, inconsistent and poor quality information to monitor field sales performance and provide targeted support to the staff that require it the most.

GAINING TRUE INSIGHT INTO PERFORMANCE

However, the rise of truly mobile CRM technology offers field sales reps access to functionality, resources, presentations and other sales material in a format optimize for the devices they use, providing them with the same resources as their office counterparts.

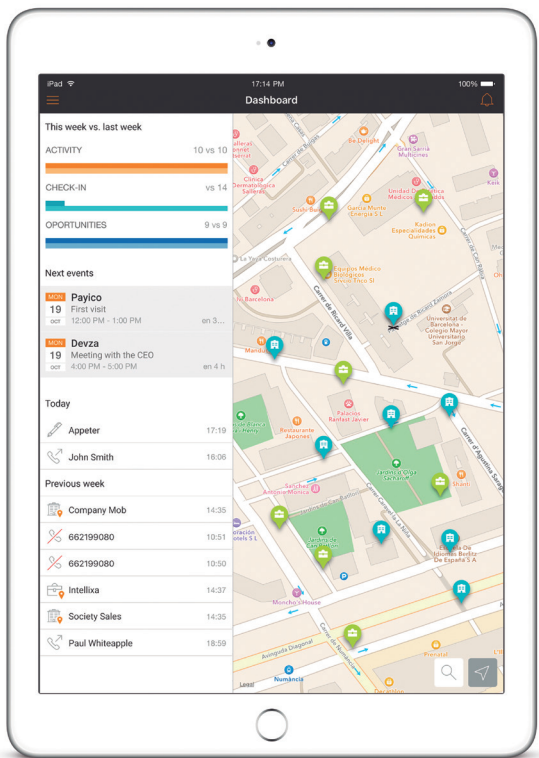
This includes delivering relationship tracking, prospect discovery, client and customer history, purchase and order details, contacts and meeting reminders, presentations and sales collateral in an easily accessible, mobile-friendly format, to ensure a field sales employee has all the tools required to showcase the product, service or solution. Increasingly it also includes the functionality to quickly and efficiently place orders and process the appropriate 'paperwork' to ensure a streamlined sales process.

The development of mobile CRM has also made it easier for salespeople to report while on the go, giving them access to better data and resources and enabling you to track their performance. These mobile solutions track communication such as calls, emails and face-to-face visits, giving businesses greater insight into their sales activity and performance.

With an added geolocation feature, mobile CRM systems can also provide an overview of the geographical areas where sales efforts are being focused, and where they could be missing out on opportunities. Equally it offers dynamic route planning to help sales staff

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spend less time travelling and more time in meaningful meetings. For example, imagine a scenario where one of your sales reps that is based in Manchester has two meetings scheduled in Sheffield, with further meetings in Ipswich and Cambridge and a final meeting in Leeds. Whereas a standard CRM system may send him to a meeting in Sheffield, then Leeds, then back to Sheffield and on to the South East, mobile CRM will ensure he follows the most efficient schedule and route possible, removing wasted journey time and maximising his time with potential customers. Furthermore, where the sales team member overrides this planning the solution will provide a report, enabling you to identify problems with territories and also address the issue with the team member to maximize their effectiveness.



In short, mobile CRM solutions drive the user and unlike standard CRM solutions don't rely upon the user to deliver meaningful insights, data and analysis. This not only enables salespeople to concentrate on selling but also provides useful reports for directors and managers.

As a result, mobile CRM enables you to access a range of metrics to measure overall sales performance, such as how many calls, emails and visits are actually resulting in sales. But to get the maximum value from this information, it should be used not simply to track staff activity, but also to analyse their performance and identify areas for improvement.

THE FOUR QUADRANTS OF PERFORMANCE MEASUREMENT

So how can you best approach assessing and evaluating the performance of your employees? Broadly speaking, there are four quadrants that salespeople can be grouped into when analysing their efforts and results. Let's take a closer look at how sales staff performance can be mapped using this method and how this model can be used to boost sales.

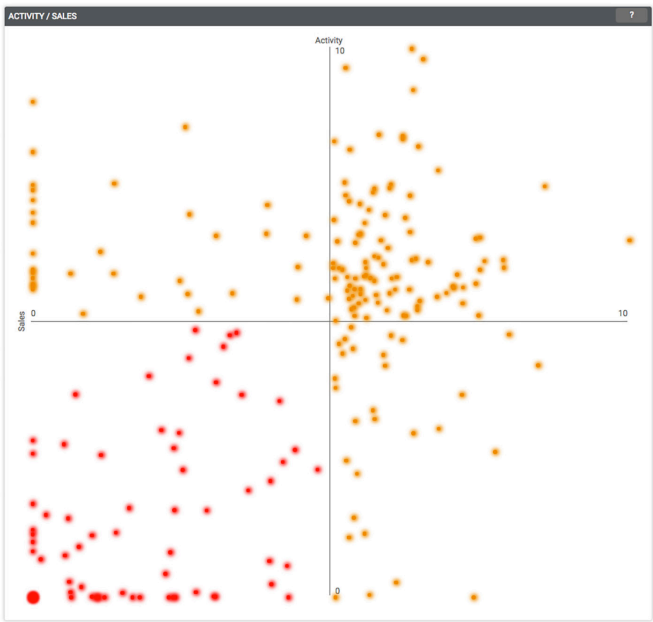
Improving Sales Staff Performance in Advertising

An advertising agency's sales force consisted of a mobile field sales team working alongside customer service representatives. The field sales team is responsible for going out and visiting customers and prospects, while the customer service representatives provide administrative support to the sales operation.

Before deploying ForceManager, the agency was using Excel spreadsheets to organize and record its sales activity. This required a lot of manual input from the small customer service team and it meant that the company had no easy way of tracking sales activity. This also did not provide the sales directors and managers with any analysis or insight into sales

results or the performance of its sales staff.

By working with ForceManager the sales director was able to generate reports on each team member's activities and successes, as every communication that the sales representative has with a contact (whether a call, email or visit), is logged automatically. The reporting and analysis capabilities this offers provided the directors and managers with actionable insight into what sales representatives are doing and how they are performing, helping them to boost performance across the business.



WORKING AND SELLING

These people are clearly the best performers, working hard and producing a high volume of sales – and they should be rewarded for it. That doesn't mean they should just be left to rest on their laurels, though. Staff need regular motivation, and relationships with customers need to be maintained and nurtured so as to maximize the potential business from each customer. You should also think about what other team members can learn from their highest performing colleagues and how, if possible, to replicate their success.

SELLING BUT NOT WORKING

Some staff are capable of meeting their sales targets without a great deal of interaction with customers. They obviously have a talent for selling but aren't striving to reach their full potential. It could be that they are spending too much time on individual contacts or that they are not planning their time efficiently. On the other hand, it may be that because they are hitting their targets, they have simply become complacent and started underperforming, in which case they need motivation to increase their efforts and in theory, generate even more sales.

WORKING BUT NOT SELLING

Sales staff can often work extremely hard without getting results. They make the calls, they send the emails, they visit prospects, but they don't generate sufficient sales from their activity. This could be a case of not targeting the right customers, not following up communication or perhaps signal that they need help in the art of qualifying and converting targets. These employees should be recognized for their hard work but given training to help them enhance their sales figures.

NOT WORKING NOT SELLING

The most concerning group for sales managers is the one that is neither making the effort nor getting results. This could be through a lack of motivation, lack of self-confidence or simple lack of selling ability. Managers need to identify why these team members are not performing and what can be done to help them improve, as it is clearly not good for business to be carrying people who are not contributing to the bottom line.

INSIGHT TO ACTION

With an increasingly mobile workforce, mapping sales staff performance is a vital function. By utilising mobile CRM technology and the four quadrants of analysis, you can use performance mapping to increase productivity, improve efficiency, maintain motivation and ultimately boost sales. Key to this is understanding the quadrants, which sector employees fall into and using this insight to shape how you manage individual staff and your overall team. Here are three ways you can turn these insights into sales-enhancing action.

1. Knowledge Sharing

The performance quadrants rely on the large amounts of data and interactions that truly mobile CRM solutions automatically capture. This data can be mined to understand why some sales staff are performing and others are not. For instance, are your best performing staff using certain resources that the lower performers are not? If so, lower performers can be directed towards the sales collateral that is resonating with prospects and customers. Are they targeting prospects in a certain sector? Again this knowledge can be shared across your field sales team so that they can target customers that are likely to have an appetite for the product.

2. Targeted KPIs

The performance data that mobile CRM generates enables you to set more individually tailored goals and KPIs, something the best salespeople will strive to achieve. For example, a team member that is selling but not working could be set a target for number of new customers on-boarded in a specific quarter. A team member that is working but not selling could be set a target relating to the number of businesses they set-up meetings with in a specific region or market sector. Finally, those that are selling can be set more challenging targets. Tailored targets will help increase motivation and ultimately boost the number of sales that are being made.

3. Recognition and Reward

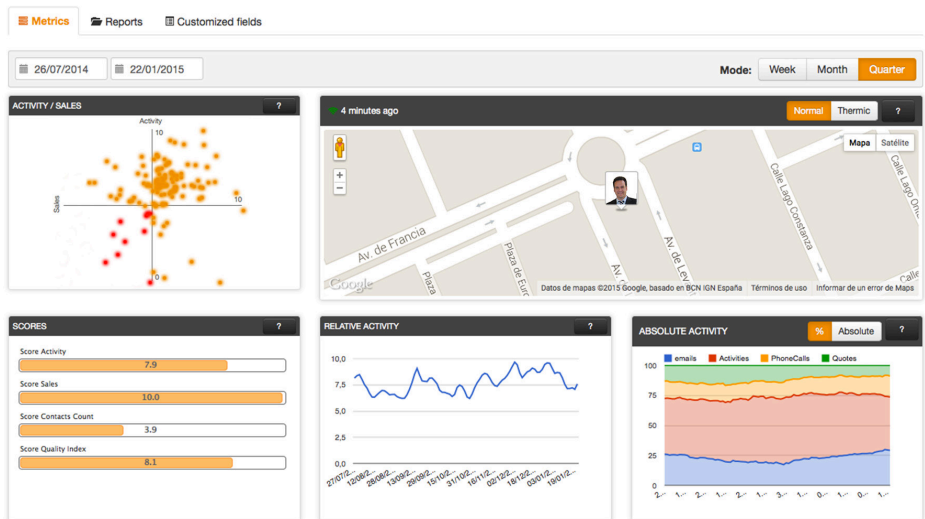
The value of recognition and reward should never be underestimated in a sales team and mobile CRM helps ensure that you have the information you require to offer justified recognition and rewards to your field sales team. In equal measure, for those that regularly fail to meet their targets the relevant training and support can be provided.

By having the data readily available you are better equipped to understand what is and what isn't working for your team. It can be used to encourage better performance and provide the resources required, at both the individual and team level, to see how staff are utilized and the monitoring of workloads while also ensuring that the best performers receive the recognition they deserve. Furthermore this can also be shared with field sales staff to foster a culture of self-evaluation and to incentivize improved performance.

In conclusion, using the data that mobile CRM technology provides, staff who are working hard and performing well can be recognized and rewarded, while those who are struggling to generate sales or underperforming can be given targeted support and training. Giving

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managers greater insight into the performance of their staff also incentivizes staff to regularly evaluate their own actions and keep up-to-date records of their sales, something that mobile CRM systems enable through fully automated reporting and streamlined CRM processes.



If you are going to realise your sales potential and optimise your mobile sales team's efficiency, a truly mobile CRM and sales management tool will address the challenges you have typically faced. When done right, the end result is a more efficient, more motivated and ultimately better performing sales team that can take full advantage of being mobile.