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Mobilizing CRM and Other Key Business Applications

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The Importance of Mobilizing CRM

AS SMARTPHONE USE SKYROCKETS, MOBILIZING CORE BUSINESS APPLICATIONS WILL BECOME MISSION-CRITICAL

Just as concrete and steel are crucial to the strength of a corporate headquarters building, so have mobility and customer relationship management become to modern business operations. On their own, each is a critical strategic component responsible for increasing employee productivity and improving customer service, among other benefits. Fusing them can elevate competitiveness to new levels.

No doubt, the ability to share customer information dynamically in near real time brings substantial competitive advantage to a company, says Sheryl Kingstone, a director at Yankee Group

Research. "This really is about intelligence and collaboration, and we all agree that those improve success."

Changing the Way We Work

Consider this scenario. A salesperson out on the road visiting clients receives an alert about a customer lead on his smartphone, the always-on Apple iPhone device he carries with him wherever he goes. The salesperson grabs contact info from the CRM system and shoots off a quick e-mail to the customer: "Hey, I'm in the area. Mind if I stop in so we can talk in person?" While he awaits the response, and still using his mobile device, the salesperson taps into the CRM database and reviews the customer history. A few moments later, he's gotten his OK to drop by for a briefing. Two hours later, he's taken the order for not only the new product but also a second item he knew might be appealing to the customer because of the quick refresher he sneaked in before his meeting. Not only that, but he's earned the customer's loyalty for his responsiveness and initiative.

But the story doesn't end there.

Upon walking out of the customer site, the salesperson immediately fires up the CRM application again and enters the product orders. This simple action shortens the product delivery cycle, which, in the absence of mobile CRM on a handheld, wouldn't have been triggered until the salesperson returned to his hotel or office, fired up his laptop or desktop, connected to the corpo-

"The ability to share customer information dynamically in near real time brings substantial competitive advantage to a company."

— Sheryl Kingstone,
Yankee Group Research

rate network and entered the order—sometimes, sadly, as much as several days, if not a week or even more, later. Ultimately, by using mobilized CRM for a handheld device, the salesperson has provided shorter time to revenue for the company.

"This is about pushing business forward," says Nora Tucker, product marketing manager for Sybase Unwired Platform.

Embracing a Culture of Mobility

What's more, companies that craft mobile CRM strategies today gain advantage because they're prepared for the rise of the so-called millennials, the up-and-coming workforce, Kingstone says. "They'll be capable of transforming when the younger, always-connected generation comes into the workforce. And they'll be able to meet their consumer demands more readily," she says, wondering, "If a company hasn't even adjusted its workforce toward mobile CRM, how is it going to embrace the consumer culture and customers' also being mobile?"

For good or bad, the more mobile customers themselves become, the less patient they

Sybase and SAP:
A Mobility Tag Team

As today's workforce grows increasingly mobile, enterprises are starting to recognize the benefits of allowing these employees to access critical business systems from their mobile devices.

With this new business reality in play, leading enterprise software providers have begun strategizing about how best to meet their customers' mobility needs. SAP, for example, has partnered with Sybase to ensure that its enterprise software customers can easily make SAP Business Suite software a part of an employee's mobile work life.

The companies have collaborated to deliver two mobile solutions for the first time to iPhone, Windows Mobile and other devices by leveraging Sybase Unwired Platform, a mobile enterprise application platform. Sybase and SAP jointly sell and support these cobranded solutions:

- **Sybase Mobile Sales for SAP® CRM:** Automates sales processes, increases productivity and enhances customer service by equipping sales professionals with anywhere, anytime access to SAP CRM through smartphones such as iPhones and Windows Mobile devices.

- **Sybase Mobile Workflow for SAP® Business Suite®:** Enables mobile workers to complete business processes—such as workflow items and alerts, time recording and travel requests that require immediate action—through a familiar and secure e-mail inbox.

"These solutions are designed with functionality that will deliver a lot of benefit out of the box," says Nora Tucker, product marketing manager for Sybase Unwired Platform. "But there's a whole world of possibility behind them as well."

Tight engineering integration between SAP and Sybase also enables enterprises to create custom solutions that mobilize the entire SAP Business Suite by leveraging Sybase Unwired Platform, she says.

"We want to give people as much value from the platform as we can," Tucker says. "We give them the flexibility to deliver the kinds of information their users want in a way they're used to receiving it."

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are in waiting for answers—be they about a product, an order status or a trouble ticket. The best way to ensure minimal wait time is by making CRM available from mobile devices.

Doing so, in fact, significantly boosts CRM use in general, Kingstone says. Whereas the CRM adoption rate within most enterprises hovers near 30 percent, adding mobility into the equation ratchets that up to 70 percent. And with mobile CRM on a smartphone, you're talking about usage daily, not just monthly or semimonthly, she adds.

Sometimes the Smaller the Better

Dramatically enhanced usage of CRM is precisely what Bluefin Solutions was after when it mobilized CRM for use on its sales-people's iPhones, says John Appleby, head of technology for the

London-based SAP consultancy. "The mobile sales force already had access to CRM from their laptops, and we needed to go the next step and make it available on their handhelds so they can make changes more dynamically while on the move," he says.

Critical to that endeavor is determining which elements of CRM to make available via handhelds and which not to bother with. "The amount of CRM you have to mobilize from the total business process point of view is actually too small to be useful," Appleby says. "So what we did is mobilize sales opportunity management, which includes the ability to at least see contacts and accounts, and lead management—leads and opportunities go together. Those were the minimum required to enable the salespeople to use CRM on the handheld device."

Keep in mind, Appleby says, that the point of mobilizing CRM is to deliver increased value. "There has to be a return, and from our sales director's point of view, that return is typically realized in increased viability of the pipeline. Gaining better control over what's happening with the sales force gives us a better understanding of the pipeline."
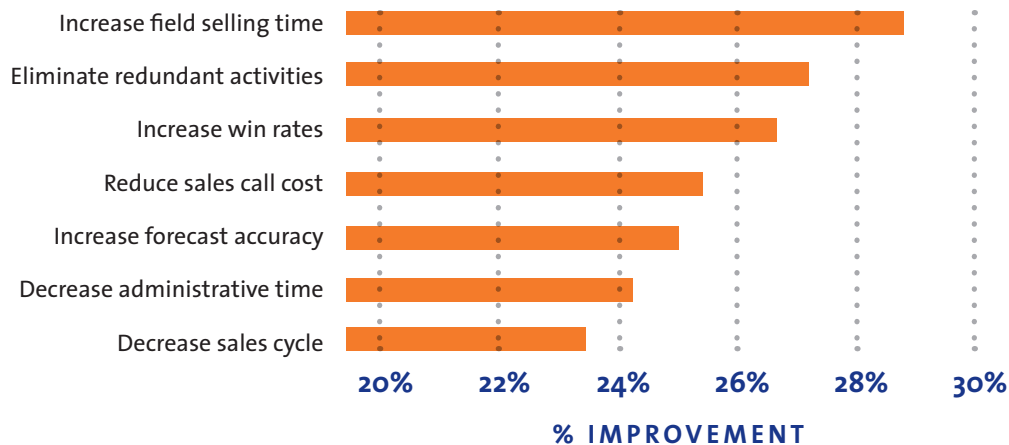
Then the floodgates open. "In consulting, a better understanding of the pipeline leads to understanding resourcing and challenges. That, in turn, triggers HR processes such as recruitment. We can use our CRM sales pipeline to drive our recruitment process and deliver solutions more effectively," Appleby says.

Safety First

Just as critical as understanding what enterprise application data to provide on a smartphone is knowing how to keep that data safe, adds Ralf Baumert, who mobilized a field service application for 450 technicians at T-Systems International, a global provider of information and communications technology services. "We're synchronizing customer-specific data on

ROI on Mobile CRM Solutions

Realized or expected percentage improvement in metrics from implementing mobile sales force automation technology and services for the U.S. in 2008.

Metric	% Improvement
Increase field selling time	~29%
Eliminate redundant activities	~27%
Increase win rates	~26.5%
Reduce sales call cost	~25%
Increase forecast accuracy	~25%
Decrease administrative time	~24%
Decrease sales cycle	~23.5%

% IMPROVEMENT (20% — 22% — 24% — 26% — 28% — 30%)

Source: Yankee Group, "Anywhere Enterprise-Large: U.S. Mobility and Business Applications Survey", December 2008.

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> "You need to build device management and security into your mobility strategy from day 1."
>
> — John Appleby, Bluefin Solutions

mobile devices. That has to be secured, of course," he says. (See case study, page 9.)

T-Systems' mobile security scheme includes use of an SSL VPN tunnel to secure data in transit and mobile device security software—Sybase Afaria—to protect data at rest, Baumert says. On the mobile device, the company also uses Afaria to enforce strong password access to the enterprise data, which is encrypted.

Mark Wright, a senior systems consultant at Sybase, says device encryption has become a standard best practice for enterprise mobility initiatives involving newer mobile platforms. "This is driven by devices' ability to offer more disk space and faster processors to be able to provide user-friendly behind-the-scenes encryption," he says, adding that many state and federal laws make encryption necessary for compliance purposes as well.

However, Wright notes, the rise of personally owned devices for corporate use throws a kink into the security plan. In such cases, enterprises need a sandbox—such as that available with Sybase Mobile Solutions—on those mobile devices, he says.

"The sandbox will isolate all enterprise data from personal data. Users will still be able to use Facebook and Netflix and have their kids' books and videos on the device, but the enterprise sandbox provides protections for corporate data such as CRM and e-mail through application-level authentication," Wright explains. "This has become a standard and offers the best of two worlds."

Also critical is being able to wipe corporate data from a device that's been lost, stolen or otherwise compromised, Bluefin's Appleby says. Likewise, he adds, the ability to send out new

applications and updates to mobile devices is an imperative.

"You need to build device management and security into your mobility strategy from day 1," he says.

Go Holistic When Possible

If you're being strategic, experts agree, you absolutely have to incorporate a mobile middleware platform into your plans, as have Bluefin and T-Systems. Mobile application platforms such as Sybase Unwired Platform ease integration with a variety of back-end systems and mobile devices as well as simplify management and security of the mobile environment.

Planning enterprise mobility with a corporate-wide view is a good idea, experts add. "That's forward-thinking—and more cost-effective down the road," Yankee's Kingstone says.

> "The only way you can take an effective holistic approach is with a middleware platform," Kingstone adds.

"If you're mobilizing with the entire company in mind, you need to think about mobility from a process point of view, going across all applications in a day in a life and dealing with all sorts of mobile devices."

After all, agrees Reza Soudagar, senior director of CRM Solutions Marketing for SAP, mobile users are a picky bunch. "Catering to their needs and providing the optimal user experience are hugely important. If you don't," he says, "they won't use the business application and you won't get the value out of your enterprise investment." ▶

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Looking at Mobility,
One Department at a Time
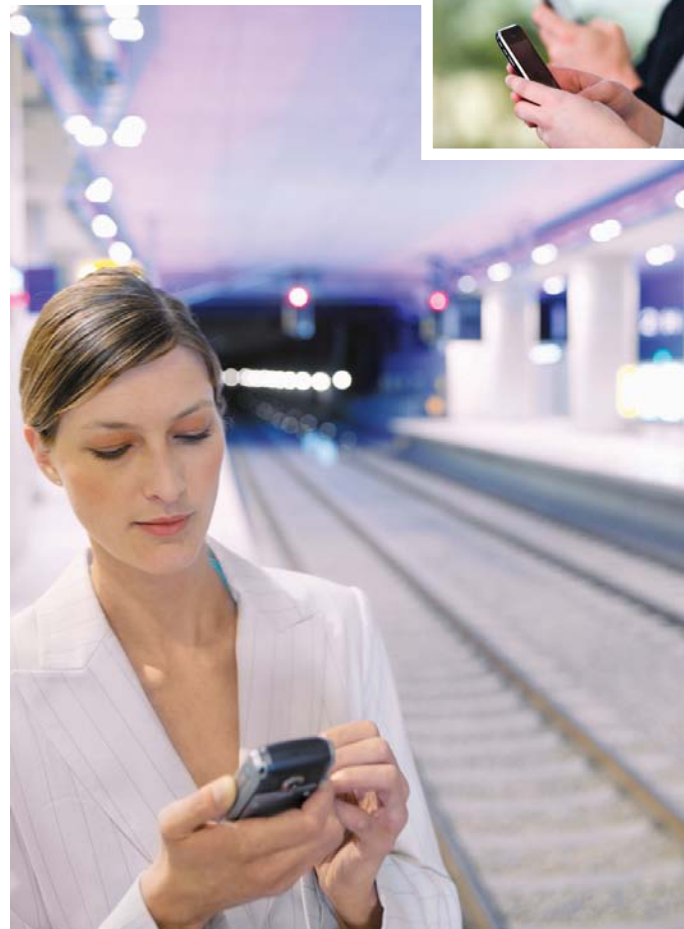
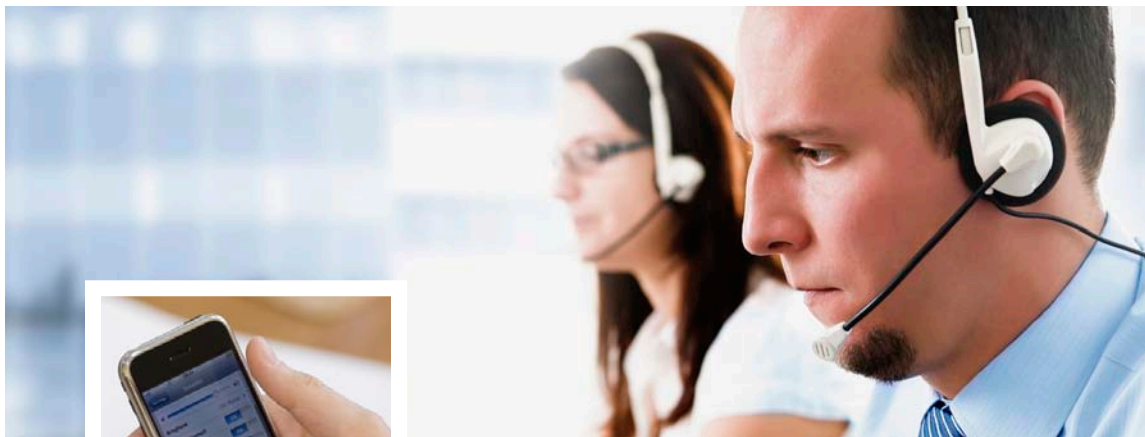## DIFFERENT CONSTITUENTS, DIFFERENT BENEFITS

The uses and benefits of enterprise mobility differ from one knowledge worker to another, depending what department or business unit they work in. Here is a partial list of typical departments and the unique benefits mobility offers to workers.

MANAGEMENT: From the CEO on down, corporate managers can increase their effectiveness when out of their office if they're able to tap into critical corporate data in real time. Thus, providing them a dashboard view of key performance indicators, for example, will help them make on-the-spot decisions during deal-making. Likewise, they can provide better advice to sales teams and other personnel if they can call up pertinent data—margins or order history, for instance—while being consulted on a customer sale.

In addition, giving managers the ability to handle approval requests—think time off, time sheets, sales discounts and the like—on the fly speeds those workflows significantly while allowing executives better use of their time.

SALES: On the road, salespeople can be more productive and provide better service if they have real-time access to customer data stored in the enterprise CRM system. They can push business forward more quickly, too, by entering orders while

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the production line is returned to service, the greater the daily output and the better the revenue opportunity.

RETAIL: Store clerks don't need to tie up a central register to check product availability for a shopper. From the floor, a clerk can tap into the inventory management system, call up the image of the out-of-stock item for the customer and either point that person to the closest store with the item in stock or place the order for the shopper directly from the handheld device. ▶

Organizations Need to Support Multiple Devices and Personally Owned Devices

Agreement with Statements Regarding Support of Handheld Devices

on the go. Likewise, sales executives get a much clearer picture of sales activities when sales personnel enter customer data while still onsite rather than weekly or even monthly.

SERVICE AND SUPPORT: Automating trouble ticket and service order applications for delivery directly to and from a technician's mobile device streamlines the process and eliminates paper waste. Customers are better served, realizing shorter time to problem resolution, and technicians can service more clients per day if dispatches are automated upon ticket completion.

HUMAN RESOURCES: Letting employees fill out and submit time sheets, vacation requests and expense reimbursements from their mobile device rather than from a connected laptop or desktop speeds workflow and makes for happier employees. Rapid approval of requests reduces time required for these processes, and process efficiencies, in turn, can lower costs.
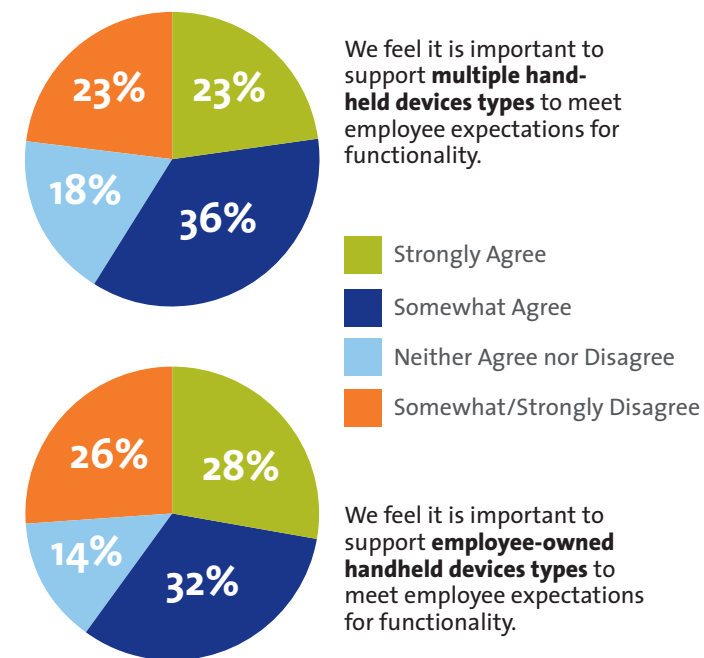
MANUFACTURING: Give plant managers mobile access to the spare parts database so they can determine, on the spot, whether the broken valve on the production line is in stock. Better yet, use RFID tags on the spare parts and give the plant managers a Global Positioning System (GPS)–enabled smartphone so they can not only verify availability but also determine exactly where (closet, shelf and bin) they'll find the part they need. The faster

Pie chart 1:
23% — 23% — 36% — 18%

We feel it is important to support **multiple hand-held devices types** to meet employee expectations for functionality.

- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat/Strongly Disagree

Pie chart 2:
26% — 28% — 32% — 14%

We feel it is important to support **employee-owned handheld devices types** to meet employee expectations for functionality.

Source: "Computerworld Market Pulse Study", November 2009

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CRM Mobilization To-Do List

A STEP-BY-STEP APPROACH TO GETTING IT RIGHT THE FIRST TIME

If you want to get CRM mobilization right the first time, follow these logical steps:

1 Support multiple device types. Apple's iPhone, Google's Android, RIM's BlackBerry and a slew of Windows Mobile smartphones: If it's out on the consumer market, it is already or will soon be your enterprise concern as employees increasingly demand that their personal device become their work one too—or vice versa. "We think there will be at least two, if not three or four, types of mobile devices in every organization, going forward," says Nora Tucker, product marketing manager for Sybase Unwired Platform. The mobile application platform a CIO picks for today's devices must be able to support tomorrow's choices as well.

2 Provide real-time integration with back-end systems. If mobile workers are receiving information from back-end systems in real time, they can make better-informed decisions and take smart actions based on up-to-the-minute data. "It's about having access to that real-time data when you need it, even if you're at a customer site," Tucker says. Likewise, the business reaps benefits when mobile users update back-end systems in real time. Sales orders get booked more quickly, shortening time to revenue, for example, and approvals get processed in a more timely fashion.
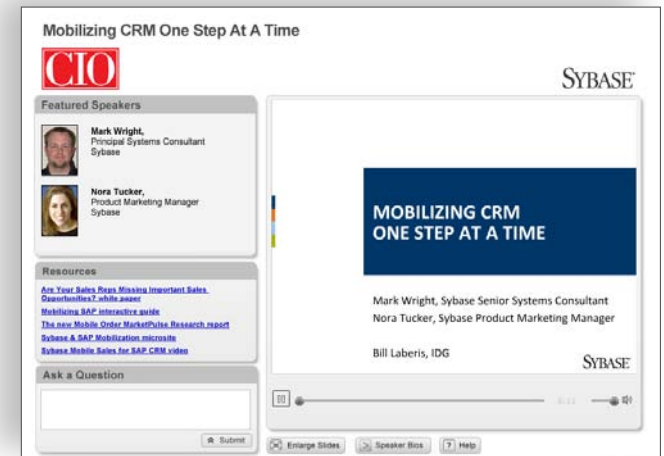
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3 Safeguard data in transit and at rest. You don't want anybody snooping out your customer data or other intellectual property as it travels from the corporate network to the mobile device. If the data is sensitive, it must be encrypted for transport. In addition, ensure that you can store enterprise data on a secure portion of a device, accessible via password only. Consider that portion of the device to be enterprise property, and be sure your mobile security solution allows for remote device lockdown and wiping of that data if the employee leaves the company or loses the device, Tucker advises.

4 Implement device management. Especially if you're allowing support for multiple device types, you'll want a solution that manages those devices through a single console. "You'll save yourself some headaches if you don't have to deal with independent management systems for each device type," Tucker says. In addition, look for mobile management platforms that enable over-the-air provisioning of software updates. Otherwise, Tucker cautions, users will need to bring in their mobile devices for IT to update, which will take away from the time they could otherwise be spending on revenue-generating activities. ▶

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Enterprise Mobility Fits to a 'T'

SYBASE UNWIRED PLATFORM SUITS T-SYSTEMS INTERNATIONAL'S FIELD SERVICE NEEDS.
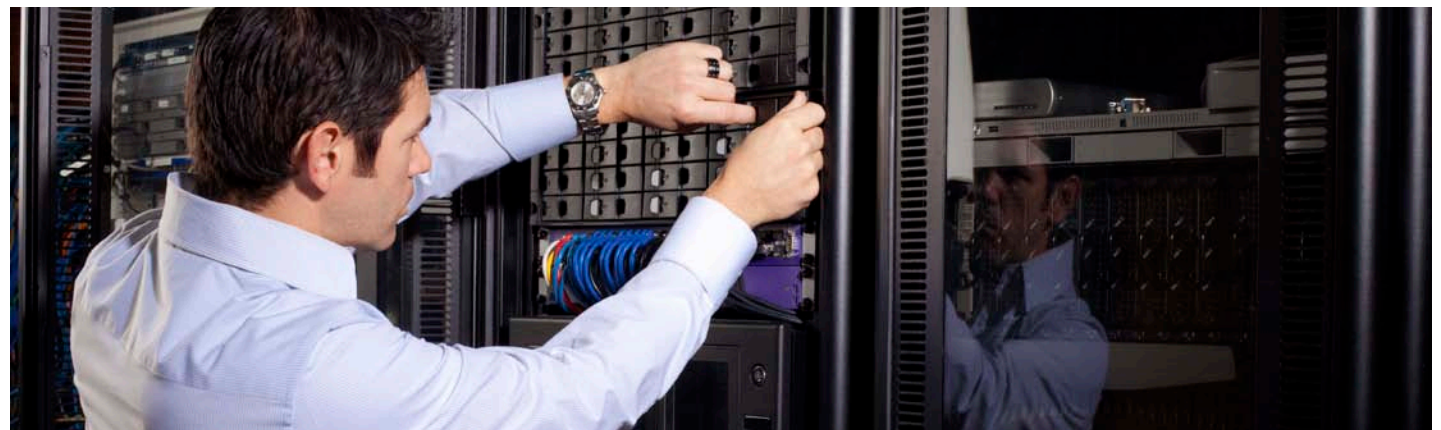
T-Systems International is a leading provider of information and communication technology (ICT) systems for corporations and public sector institutions. Some 46,000 employees combine industry expertise and ICT innovations to add noticeable value to their customers' core business all over the world. T-Systems generated revenue of around EUR 9,3 billion in the 2008 financial year.

Part of being a leader is delivering world-class service to customers at their locations. Seeking to differentiate themselves, T-Systems set out to mobilize the company's back-end trouble-ticket application and give field technicians smartphone access so they could better respond to and resolve client issues in the field, in real time.

The Problem of the Disappearing Fax Machine

Traditionally T-Systems field service technicians reported to their home offices in the morning, gathered their printed work orders for the day and then headed out for repair calls. Once a site visit was completed, the customer would sign off on the ticket, which the field service technician then faxed to a central collection point for input into the back-end system. But fax machines are becoming rare in the modern business office and were no longer readily available at a site for a technician's use, Baumert explains.

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> ‘Digital natives’ expect to work with modern technology.
>
> Ralf Baumert,
> T-Systems ICT Presales

"The disadvantage is that the field service technician now has to drive to his office to print out the ticket and then fax it," he says.

At times, the delay between job completion and input into the back-end system caused T-Systems technicians to miss service-level agreements (SLAs). "The SLA was fulfilled from a technical standpoint, but wasn't not documented early enough. The consequence was that IT support was penalized," Baumert says.

Reasoning that enterprise mobility technology could make that problem disappear, T-Systems rolled out a Mobile Action Request Incident Approval (mARIA) application to 450 field service technicians throughout Germany. Now, Baumert says, "the information about closed tickets is in the system in minutes and even seconds, and that means much better fulfillment of SLAs."

The Importance of a Flexible Platform

As T-Systems developed the mARIA program, and with an eye toward future growth, the company quickly realized the need to use a mobile enterprise application platform that would ensure flexibility on the front and back ends. "We anticipate coming to a point where we will support SAP on the back-end and the iPhone with this application," Baumert says as an example.

Plus, ICT's expectation is that mARIA is merely the beginning of back-end mobilization throughout T-Systems. "We are in discussions about the future of the complete data communications infrastructure of the company in Europe, and that represents a huge number of workers," Baumert says. He suggests, for example, that the members of the 15,000-strong telecommunications infrastructure field service organization could similarly benefit from mobile access to their back-end applications.

"Having an established relationship with Sybase, and highly positive service experiences with the company and the integration of its technology, T-Systems quickly decided on the Sybase Unwired Platform," Baumert says. "We knew that the technology was robust and that it would enable us to connect to different back-office systems and use different front-end devices," he adds.

The Benefit of Being Modern

Besides improved SLA performance, T-Systems is reaping a variety of other benefits from going mobile, Baumert says. For example, the new Windows mobile devices T-Systems distributed to the technicians replace notebooks.

The conversion of field technicians from the traditional laptop to handheld smartphones will deliver a hardware savings cost of roughly 40 percent.

In addition, technicians spend less time driving, since they can eliminate trips to offices for faxing, for example, and can drive right to their first customer rather than going to an office first. This increases productivity, Baumert says. It also reduces fuel consumption and unnecessary vehicle use. The implementation of the application is literally saving money and improving sustainability.

And last he adds, the incoming generation of workers—known as "digital natives"—expect to work with modern technology. "When they start up at an IT enterprise, they are a little bit confused when asked to work with paper rather than a mobile device. They want to be at an enterprise where they have fun working and are equipped with modern infrastructure." ▶

What's Next

RESOURCES AND ACTION ITEMS FOR YOUR MOBILE MANAGEMENT STRATEGY

A Checklist of Key Moves Emerging from This Playbook

✔ **LOOK** across the enterprise to identify employees who would benefit from smartphone access to critical business processes and workflow; consider increased intelligence, better customer service and improved productivity, for example.

✔ **UNDERSTAND** how best to prepare your company for a millennial workforce that considers mobility a given, the smartphone a basic business tool and instant information access a nonissue.

✔ **ASSESS** enterprise applications for smartphone deployment, analyzing which pieces are necessary in the mobile environment and which aren't.

✔ **ENSURE** the manageability and security of mobilized enterprise data by implementing an enterprise mobile application platform capable of enforcing policy and keeping data safe in transit and at rest.

SPEED READING

A small sampling of must-see resources on mobilizing CRM and other key business applications.

"Are Your Sales Reps Missing Important Sales Opportunities?" White Paper

"Mobilizing CRM One Step At A Time" Webcast

"Mobilizing SAP" Interactive Guide

"The New Mobile Order" MarketPulse Research Report

Sybase Mobile Sales for SAP® CRM Video

Sybase Mobile Workflow for SAP® Business Suite Video

"Sybase & SAP® Mobilization" Microsite