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Business On The Move

Introduction

Making your workforce mobile is about making them customer centric 24/7. A mobile salesforce and workforce can respond more urgently to business opportunities, recover from problems faster and address customer problems more quickly.

But organisations face a particular challenge. While teleworking and remote-access are becoming increasingly the norm, the majority of business applications, and the critical customer data contained within them still remain cordoned inside the four walls of the enterprise.

Once field workers leave the office they become isolated from vital customer information and desk-bound enterprise applications lose their immediate value. A mobilisation strategy can counter this. At a corporate level mobile business applications play an integral part of increasing customer satisfaction levels and meeting increasingly stringent service level agreements in an ever more competitive marketplace.

A Mobile Market

There's no doubt that the drivers for a shift to mobile working are real. There is a widespread acknowledgement that the technology is now in place to support genuine mobilisation, PDAs, smartphones, Blackberry boxes and laptops are fitted with HTML browsers and can be wirelessly connected to the Internet at any place and time. But companies need to understand that a mobile strategy is not about going out and buying a TomTom or the latest PDA. A successful mobilisation strategy will focus on changes to the way of working that wireless technologies can enable and on the types of mobile application that will deliver genuine business benefit.

Forrester Research suggests that companies are in fact ahead of the curve in adopting mobile applications, with sales force automation applications the most prevalent, followed not far behind by customer facing applications which are now in place at around 28% of organisations.

Research in Motion – makers of the hugely popular Blackberry device – identified CRM as the most requested application for its technology. Market analyst firms Gartner predicts mobile CRM growth of around 40% to 60% for the next two to three years.

The benefits of mobility

The benefits of mobilisation should accrue on multiple levels: the mobile employee's working life is improved; the employer sees efficiency gains, cost savings and better management information in real-time; while the customer gets a better service.

Gartner estimates that hard cash ROI on mobile applications used by the sales force to be around 200% annualised. Equally compelling are the softer ROI benefits, which are harder to quantify. These will include increased convenience, greater ease of interaction with customers and in turn higher work satisfaction levels.

Productivity and efficiency gains are the softer benefits of mobilisation. Consider the most frequently used mobile application – email access. Simply being able to check email on the move or out of the office makes good use of otherwise dead time and more importantly frees up time to do other more productive things.

Field force mobilisation boosts the efficiency of both office-based staff - who spend less time talking to workers in the field on mobile phones to deal with work-related issues – and with the mobile workers themselves who enjoy a streamlined workflow, less paperwork and have immediate access to more accurate information which enables them to carry out more work in a shorter period of time.

At a business level, direct wireless integration with corporate applications gives managers the kind of real-time information that they need to monitor and manage a geographically-dispersed workforce. This single-system integration can also be used to trigger back-end fulfilment processes, such as immediate invoice generation to improve cash flow or real-time order processing which will speed up deliver times.

So in practice, for example, an engineer based in the field might begin his day by checking the job list for the day from his home. The job allocation system in the office will have scheduled work for him based upon his location and the various jobs proximity to one another. The engineer sets off on his route, using remote access to company records to check product configurations from his van before entering the customer's premises. Upon completion of work at each client, notes are uploaded back to staff in the office. If parts are required for any job, these too can be ordered remotely. In addition, the customer service team can contact the customer within an hour to arrange a follow-up visit.

Alternatively consider the salesperson setting out to make a call on a customer to review current product implementation status. The night before the visit is scheduled, she can check the office-based CRM system from her hotel room to get up to speed on the most-up-to-date customer status report. At this point, she realises that it would be useful for some additional collateral to be sent to the customer, so she accesses brochure documents from the corporate sales and marketing system and emails them direct to the customer. Confident that everything is in place, she heads off to meet the customer the following morning. But en route she receives an alert warning her that a critical issue has arisen overnight. She contacts her call centre which provides her a potential solution, enabling her to tackle the problem head on before proceeding with the original agenda.

Both of those scenarios will result in sustained or enhanced levels of customer satisfaction. Problems that might become crises are dealt with in a short timespan which contains and nullifies any damage that they might do. Customers are left feeling that their issues are being addressed immediately and in an informed manner in the case of the engineer and are anticipated and tackled in the case of the saleswoman. A happy customer is less likely to churn and more likely to spend more money in the future.

Practical Considerations

It's important to approach mobilisation as a business project, not a technology one, although there are clearly technical considerations. When setting out to select a

standard mobile device, don't be tempted just to opt for the flashiest or the most up-to-date. Ask what types of network can any device support – wi-fi, Bluetooth, WAN etc. Is the screen big enough to render useful and readable information? Does it have a keyboard that can be used easily to input data? Do you want a QWERTY keyboard or can you cope with a more limited keyboard because the software works anyway. What formats can the device handle? Do you need it to read text files, PDFs, PowerPoint slides or Word files? Increasingly, will it have to work with video and other forms of multimedia.

Consider what information has to be displayed on the device and what information needs to be input into it. This is not just texting – this is account information, credit histories, current order status and so on. It's important to remember some of the limitations still in place with mobile technology as this will inform your choice of infrastructure. As current technology stands, PDA and other wireless handheld devices are still better for receiving information than for inputting large amounts of data. So they are great for accessing customer records, less useful for writing up the notes of a customer meeting in detail. For that organisations might want to kit out their mobile workforce with laptops.

Mobilisation should be an enabler, not create additional complexity. When planning application roll-out, think about the activities that mobile devices will have to support and strip things down to the essentials. Focus on what is most useful to your mobile workers and don't try to give them the full 'bells and whistles' experience of a fixed enterprise system on a PDA. Will the mobile application be able to be used in areas where wireless connectivity is sporadic or weaker? Can data be input offline and uploaded when a good connection is available?

In addition, think about what fixed office systems your mobile workforce needs to be able to access remotely. The obvious candidates are clearly emails and customer records. But would it also be useful for sales teams to be able to check inventory, track consignments or place orders? Maybe it would even save time – and make the workforce happier – if they can submit their expenses from outside the office.

Involve the end users in the formulation of your mobilisation strategy. Don't underestimate the cultural impact of mobilisation. It's important to involve all the corporate stakeholders. The most success mobilisation rollouts will have had end user participation at the selection and specification stages as well as during the deployment phase. If such end user participation occurs then it's likely to improve the prospects of widespread adoption of the mobile applications and the mobilised way of working. Make this an ongoing process. Solicit and act on user feedback on an ongoing basis.

Above all, take a 'bigger picture' view. If you approach a mobilisation strategy as an isolated activity rather than as a integrated part of your corporate business and technology strategies, then it will not provide the seamless efficiencies and optimisation that it can potentially offer. Approach your mobile applications and your office-based applications as part of a single system, not as two separate entities. Think in terms of a wholly integrated single system that takes you from the point when the customer calls through servicing and invoicing to getting payment in.

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