


Selling on the go

Why is mobile CRM
a must have for enterprises?



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Why mobile CRM matters?

Mobile computing is now center stage and fast becoming the default way of accessing the Internet. Since 2015, 59% of US adults have used mobile devices instead of desktops to access the Internet. Business Insider predicts mobile commerce to *touch \$284 billion*, with a 45% share of the US e-commerce market, by 2020.

The growing adoption of mobility has big implications for enterprises. Customers now prefer mobile apps to shop and interact with a company without having to take the trouble of visiting the establishment. Moreover, since mobility enables work-on-the-go, customers expect instant responses and real-time actions, minus the standard “let me get back to the office” excuse. Such changes in customer preferences force drastic changes in business models. Naturally, the sales team requires immediate and real-time access to the latest information related to the business and the customer.

This is where a mobile CRM comes in handy. Powered by cloud-based database and servers, and accessible through intuitively designed apps, a mobile CRM helps businesses cope with the change and orchestrate successful customer-centric shifts in their business models. Sales executives, field service technicians, business managers, and other sales executives can access a mobile CRM at any time, from any corner of the world, which improves their performance and customer satisfaction simultaneously.

Empowering Sales Executives

Sales executives are the first line of contact for customers; hence, they gain the most with a mobile CRM. The ability to access CRM data, complete with analytics, through their smartphones gives them the dual benefit of being armed with cutting-edge information to engage with the customer on powerful terms, and being able to focus on the core task of furthering sales without the hassles of gathering information or performing other administrative tasks.

A mobile CRM gives sales executives real-time information on account history, products purchased recently by the customer, history of previous interactions, any set preferences, and other critical updates related to the customer on hand. Armed with all information at their fingertips, sales reps no longer have to waste time seeking contact information or trying to recall the last conversation they had with the customer. Empowered with real-time information and ability to communicate with managers instantly on a reliable platform, sales executives may close deals on the fly, without delays. This is a big development from the total information blackout they experienced the moment they step out of the office, not too long ago.

Sales executives gain several other incidental benefits as well, enabling them to become hyper-productive and efficient. They could integrate the calendar with the CRM and plan the day efficiently, use an in-built click-to-call option to dial customers and set meetings, share files with customers, update leads, and do more. The custom app feeds in information automatically to the clouds based CRM back end.

A mobile CRM, such as Salesforce's Mobile Sales Cloud, is proven to improve both productivity and results. Evidence suggests a mobile CRM enables sales executive to increase the number of service calls per week by 15%, and *increases sales by 20%*, while simultaneously lowering the cost of the sale by 15%, on average.





Improved Field Service

Field service technicians and support executives, armed with a mobility-powered CRM, can engage with customers or clients in a much better way than before. Support executives and field technicians may reach out to the customer in real time, and provide the latest, complete, and up-to-date information regarding the shipping status of the goods purchased, the exact time their complaint ticket will be resolved, the GPS location of the technician scheduled to make a site visit, and more.

A field service technician may use the mobile CRM app to not just gain critical insights related to the product, but also communicate with the office directly, in real time, and get additional inputs to finish the task on hand, without having to make a second visit. Billing and invoicing likewise become seamless and automated.

A mobile CRM platform allows instant and simple escalation of issues. Co-opting algorithmically enhanced scheduling capabilities could route a specific issue to the right personnel, depending on the specific skill sets required to resolve the issue, geographical history, the technician's previous engagement with the customer, and other set parameters.

The Salesforce1 Mobile App supports service technicians and others with automated processes for the full range of field activities. It even becomes possible for field executives to connect with experts, and finish the task with their assistance, sparing the need for re-visits, and eliminating delays.

Leading from the front – what Sales Managers gain from a Mobile CRM

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Managers leverage mobile CRM to stay on top of the game. They can gain updates on any account, track the progress of sales executives, tap into conference calls, receive cases escalated by customer support or field executives, update CRM data after meetings, access real-time sales reports in dynamic formats, and so much more, all in real time. Integration of real-time analytics and live video feeds enable them to monitor the status of jobs easily, and update the CRM accordingly. They can take appropriate action on contextual notifications pushed to their mobile devices, even when on the move.

Armed with a mobile app, sales managers remain in the loop, capable of proactive interventions. They are able to nip issues in the bud, unlike the hitherto practice of responding to issues after the damage is already done.

Speedy closure of deals is of critical importance in today's highly competitive and fast-paced business environment. Any delay could lead to either the customer being poached by a competitor, or worse, give your business a poor image in the name of inefficiency.

Salesforce CRM has always enabled managers to exert great control over the process, without intruding into operations. The mobile version of the Sales cloud extends the capability. While hitherto, managers had to be in their office or be equipped with a laptop, they can now exert the same power and influence in a non-intrusive way, through a smartphone app. They remain on top of their game even when commuting to work, flying for a business visit, or enjoying an extended vacation.



How Mobile CRM Gives a Fillip at the Enterprise Level

Mobile CRM enables the enterprise to engage with their customers on a personalized, one-to-one basis, and nurture the relationship. The CRM may be easily customized to offer critical information on the spot such as inventory availability, current pricing models, and so on.

The mobile platform is also optimal to engage with customers in innovative ways and reshape the customer experience delivery. For instance, enterprises could launch a new distributed support model, with the technician or executive closest to the customer, or most competent to handle the issue, tagged to a complaint. The data from CRM, identifying the customer's demographics and service history helps in identifying the most appropriate technician.

A mobile CRM also converts the static sales lifecycle into a dynamic one. Consider the case of the customer service agent making a change to a support ticket, simultaneous to the accounting team updating an invoice, or the accounts in charge making changes in purchase note owing to a missed delivery, after the invoice is generated. In such scenarios, the field technicians and customer support teams would be equipped with the relevant information on a timely basis, to inform the customer proactively.

Mobile CRM shortens the sales cycle as well. When orders are submitted as soon as the deal is struck, without delay until the rep returns to the office, the process kicks in immediately, and delivery occurs sooner, improving both process efficiency and customer satisfaction. Also, closing sales with fewer interactions allow sales reps to dedicate more time to work on more new opportunities and increase earning potential.

An incidental benefit is a reduction of errors and better quality. A mobile CRM enables collecting information at the source, reducing the steps between the data source and collecting such data. For instance, a mobile CRM allows direct capture of a conversation with a client, eliminating the steps of writing down minutes and re-entering it at the office, where the chances of errors, or even worse, failing to update the CRM, are high.



A good example of such an intuitive and hi-power mobile CRM is [Salesforce's Mobile Sales Cloud](#), which extends the power and reach of the traditional Salesforce CRM to the mobile. The offering redesigns the interface for mobile functionality, and provides unbridled flexibility, enabling the sales team to engage with customers in highly innovative and customized ways. It drives efficiency, and powers automation in a big way as well.

Salesforce Lightning offers an intuitive set of tools and technologies, enabling enterprises to build custom mobile apps and user interfaces on top of the CRM. The Lightning Component Framework offers reusable components, facilitating extensive flexibility and customization opportunities. Developers may leverage these components in Salesforce1 Mobile app and template-based communities, or build their own stand-alone apps.

A CRM with mobile capabilities is a very powerful beast, resulting in manifold benefits across the value-chain. It powers a quantum leap in productivity and efficiency of the sales team, and causes an exponential increase in customer satisfaction levels. It virtually offers each member of the sales team with the services of a highly qualified and super-efficient data scientist, enabling them to close more deals faster.

About Suyati

Suyati is a fast-growing, digital transformation solutions company that helps you rebuild your customer experience for the digital consumer. We collaborate with businesses to strategize and implement impactful digital initiatives that position our clients ahead of the competition. We are digital-first and we focus on delivering digital transformation solutions that support your various engagement strategies. With our niche and rich expertise in a wide range of technologies and services- CMS, CRM, e-commerce, Cloud, IoT, Data Analytics, and Product Engineering- we help companies leverage their best on web/cloud/mobile platforms.

We enable you to create insights driven customer engagement across all touch points to build a unified marketing approach. Our custom technology solutions have been deployed successfully in companies across the globe, especially in the US, UK, Europe and Australia.

Learn more: www.suyati.com

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Mobile CRM and whether your
company needs it?*

*Write to us at
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