



Sales people are on the move and away-from-desk attending to day-to-day business issues. This often means that they have to get back to their desk before they can attend to a customer enquiry. This could take a couple of hours or even days and no organisation can afford to keep its customers waiting that long.

MyMobility™ has solved this problem of getting knowledge to market quickly and effectively by putting your entire office onto a mobile device.

Our away-from-desk Mobile Solutions ensure that your entire Sales Force is always available, allowing them to do business anywhere at anytime.

Executive Summary

Organisations worldwide are increasingly reliant on mobile access to information to gain a competitive edge, improve customer service and assist in closing business more efficiently.

Providing real time accurate information to away-from-desk workers means the ability to process an order, look up stock levels, access customer order history or communicate with the office intelligently at the point of business activity, providing an organization with a distinct competitive edge.

This document focuses on the proven benefits offered by Mobile Solutions in the area of Sales Force Automation.

Key focus areas

- ❖ What are the traditional challenges and issues to overcome in the sales area of the modern day business?
- ❖ What systems and processes have been implemented in the past to address these challenges?
- ❖ How technology playing a role in addressing these challenges?

Enabling the Sales Force

- ❖ We explore the benefits gained from mobile solutions in the field and at the customer face
- ❖ We explain the impact of mobile solutions on administration processes and the back-office



The traditional approach to Field Sales

The challenge most organisations face is a sophisticated 21st century customer that demands and insists on instant access to information – be it a quote, up to date pricing or response to a sales query. If customers' information needs aren't met, they simply move on to an organisation that can meet them.

When meeting with a customer, the sales person is expected to have product information, pricing and stock availability knowledge at their fingertips. If this information is not on hand, sales deals are delayed due to the lag in getting the right information back to the customer. The customer more often than not may be lost to a competitor, who's sales person is more organised and efficient.

The challenges

Prospecting for Sales

- ❖ Relevant information about the customer must be gathered before a call, such as customer relationship history, the order history, product literature, any relevant email correspondence and notes about the customer, as well as the latest sales enquiry.
- ❖ The sales person may need to call the office for assistance or travel back to the office between calls to perform administrative tasks or to complete orders, quotations and deal with new customer requests
- ❖ The organisation may have a CRM system in place, but the sales force generally only has access to the system from their desk, meaning that valuable information is often lost in the field. There is usually a double-effort in re-capturing notes, from the day into the CRM and other back-office systems.

Planning Field Activities

- ❖ Allocation of sales leads to the correct sales person may be ad-hoc according to who is available or

possibly according to a regional or market segment break-down

- ❖ However, when all sales staff are away-from-desk, the response time is poor because sales people only get the enquiry or message when they return to their desk to return calls or get to their desk to read emails.

Information & Customer Proposals

- ❖ Paper based processes in the field make it difficult to control business processes because all information must be transferred into line of business systems in the back-office
- ❖ Stock control is very basic or not done at all due to manual processes, and the difficulty of tracking Stock availability due to the lack of information.
- ❖ Cellular voice calls are a major overhead, as the sales person relies on phoning colleagues or the office to gather more information to solve a problem and to get new calls

Customer Orders & Closing the Sale

- ❖ If a new order is received from the customer, this is usually filled out on paper, completed at site with a customer signature and a copy left with the customer
- ❖ The quality of information captured at site is usually poor and the sales order may be incomplete, as this is left up to the Sales person to decide what to capture at the site.

The Customer Experience

- ❖ The customer only gets a final bill after days or weeks, once the back-office processes have been completed
- ❖ Customer billing queries are commonplace due to lack of information on the sales order and proof of what work was delivered
- ❖ Basic customer relationship management (CRM) poses a challenge within the sales force automation space, due to poor information flow and manual processes and data often being captured much later when sales people are in the

office , often losing key information about the clients.

The manual processes and inherent paper trail associated with the traditional sales approach, results in wasted time and effort as data is recaptured and checked at each stage in the process, which ultimately adds up to poor and inconsistent service to the customer.

The role of Mobile Solutions in Field Sales

Mobile Solutions provide instant access to information for away-from-desk workers. In the case of sales and related services, the goal is to improve the customer 'experience' from start to finish, and to utilise the Sales Force as efficiently as possible. The first step to achieving this is by sending new enquiries and customer requests to the right sales person as quickly as possible and ensuring accurate information from the field gets back to management and the back-office.

Prospecting for Sales

- ❖ With a mobile solution, the sales person is always available. New leads and customer requests, along with supporting data, is sent to him/her and accessible wherever (s)he may be
- ❖ If the sales person has a query while at the customer, additional information may be requested and downloaded directly to the mobile device, avoiding lengthy phone calls or return trips to the office
- ❖ Acceptance or rejection of the lead or customer request can be centrally monitored, ensuring that service levels are always maintained and an lead or customer query is automatically escalated if it is not accepted or closed within a given timeframe

Planning Field Activities

- ❖ When the sales force are equipped with an always-available mobile solution, the back-office can more easily manage the utilization of resources, by driving work to the most appropriate person
- ❖ Location-based services such as GPS (global positioning) means the back-office knows the position of the Sales team at all times and therefore work may be automatically allocated to the most appropriate person, based on proximity to the customer

Information and Orders

- ❖ All information relevant to the sales call may be captured on the mobile device, including the complete order sheet, time and date stamped, stock used, or stock requested/ordered and finally a sign-off from the customer (on the screen of the PDA), effectively agreeing to the order on site.

The always-available nature of the mobile solution means that the completed sales call information may be compiled into a document and emailed directly to the customer immediately the call is completed and an SMS notification may be dispatched to key personnel thanking them for their support.

- ❖ The mobile solution may enforce better processes such as stock control, by forcing the sales person to track all products delivered at a customer site,

before accepting the order form and sending it back to the office systems.

The Customer Experience

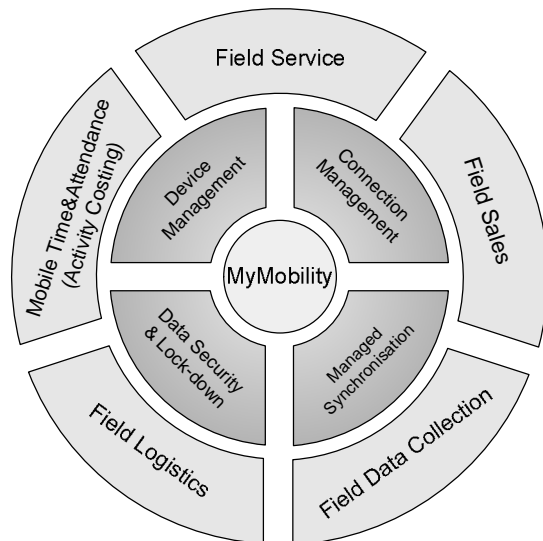
- ❖ A critical concern when processing sales orders in the field is accurate invoicing of customers for the services or products that have been ordered, and ensuring that the order form and all associated information is accurate to resolve any billing queries timeously
- ❖ When the processes are in place for companies to provide excellent sales and service delivery to their customers, whilst backing up their service with accurate documentation, then customers will keep returning. Make it easy for a customer to do business with you!

The result of using mobile solutions to automate the sales activities in the field are:

Exemplary customer service experience: which ensures that existing customers are always satisfied, costs are reduced and sales are increase because customers want to do business with you.

The result is that organisation across the globe are starting to view 'mobility' as strategic, as opposed to opportunistic. It's all about smart business!

What constitutes an always-available Mobile Solution?



At the core of every mobile solution are the following critical components:

Connection management

- ❖ Mobile solutions should be always-available. In order to achieve this, the mobile worker should not be aware of breaks in network connectivity or changes in network coverage. Connection management ensures that the mobile solution operates whether the device is connected to the network ('live') or 'offline'.
- ❖ This is achieved by means of smart mobile hardware, which allows for the complete Mobile Solution to operate from the mobile device, and all information needed by the field worker is stored in a secure mobile database for instant access.

Device management

- ❖ The ability to remotely control both the mobile devices hardware and the installed software is paramount
- ❖ This ensures that mobile workers always receive updates and the organisation is alerted of faults, without the worker having to 'return to base'
- ❖ Updated software versions can be deployed to mobile devices over-the-air without bringing devices back to base

Data security

- ❖ Mobile devices contain large amounts of sensitive data and company IP, therefore security is critical
- ❖ Lock-down ensures that a device and all its data may be remotely deleted if lost or stolen, ensuring that the information is never compromised

Managed Synchronisation

- ❖ Information is automatically synchronised between the traditional line-of-business systems (eg. the help-desk or ERP system) and the mobile devices in the field, and the frequency of this communication process may be controlled centrally.
- ❖ The synchronisation process is hidden from the user and takes place by intelligently splitting the information into small packets, thus ensuring that the communication channel is never broken even in areas of poor or intermittent network coverage.
- ❖ The transparent and continuous synchronisation of information between the organisations central systems and the mobile workforce ensures that all processes including individual tasks and events within the workflow are maintained and closely monitored.

It is this rigorous monitoring and control of information flow as it extends seamlessly out to the field and into the back-office that offers a true competitive edge to the modern organisation.

MyMobility™ Profile

The fluid nature of business means that many of your key personnel – from executive to field worker – are on the move and away-from-desk attending to day-to-day business issues. This often means that they have to get back to their desk before they can attend to a query. This could take a couple of hours or even days and no organisation can afford to keep its customers waiting that long.

MyMobility™ has solved this problem of getting knowledge to market quickly and effectively by putting your entire office onto a mobile device. Our team has been passionate about Mobile Solutions since 1996.

Our away-from-desk Mobile Solutions ensures that you're always available, allowing you to do business anywhere at anytime.

Proven areas for Mobility:

- ❖ **Field Sales:** A salesperson needs to forecast, plan & report on sales calls. Mobile functionality typically includes the ability to lookup product information and process new sales orders or access customer order history, while in front of the customer, as well as integrate with existing CRM systems.
- ❖ **Field Service:** Service personnel need to forecast, plan & report on service calls. Mobile functionality typically includes the ability to access new tasks and any supporting information in order to close the task, and the ability to send completed tasks, job-cards or other field data back to the office
- ❖ **Mobile T&A Solution:** Manage and control Time and Attendance information better in any contracting or site environment, and ensure that labour is tightly controlled according to activities completed.

We reduce any organisations costs and increase their revenues in the following simple ways:

- ❖ Reduce or remove the paper trail
- ❖ Remove duplication of tasks
- ❖ Speed up administration processes in office
- ❖ Reduce cell phone voice calls
- ❖ Reduce wasted travel for workers
- ❖ Manage the mobile worker remotely
- ❖ Increase sales via mobile intelligence
- ❖ Answer customer queries on time
- ❖ Instant documentation after closing a service or sales call

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