



Empower Sales Professionals with Mobile Sales Force Automation

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Introduction

In countless vertical business markets, mobile professionals are roaming far from their corporate campuses with laptops and cellular phones in tow. The increasing ubiquity of Wi-Fi hotspots and high-speed cellular networks, in part, has made these road warriors depend on real-time access to email, calendars and other corporate information systems.



Similarly, Sales force workers equipped with mobile devices such as Tablet PCs and ruggedized handhelds can be found in retail stores, on construction sites, in manufacturing plants, on service calls and everywhere else business is being done. Mobility gives them the tools they need for order-entry, shipment tracking and business intelligence reports. The use of mobile devices increases accuracy and eliminates redundancy, so there's no need to carry around a stack of manuals.

Throughout business locations such as factories, offices, hospitals and other facilities a new breed of mobile worker, often referred as corridor warrior are seen armed with lightweight, handheld devices linked to wireless local area network (WLANs). The real-time communications and information access made possible through these complete mobile solutions is redefining the ways professionals perform at their jobs and consequently the costs of doing business.



These solutions are helping to raise the standards that both businesses and their workers are held to. This White Paper will discuss how the benefits of mobile solutions, are empowering Enterprises and their employees to improve revenue, engage in industry best practices and offer the best practices possible with its new features, functions and capabilities.

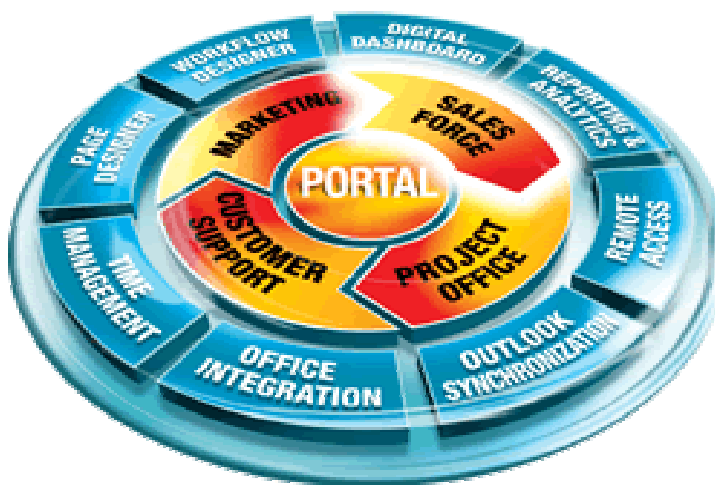
Obstacles in traditional SFA

A firm that has mobile sales force has been facing a lot of obstacles in recent times. They must continue realigning as the market changes. Earlier SFA Applications served the basic needs of field workers such as access to emails, contact management, calendaring and scheduling. Even though these features remain the dominant in SFA, the portfolio of capabilities has started to expand. A firm must adjust the pace of rebuilding the mobile force to match expected obstacles. The common anticipated obstacles are

1. **Focus** – Wasting time, money and resources on uninterested prospects. Instead of focusing on best prospects, sales force spends time on all the prospects.
2. **Access** – The Sales person often are not able to satisfy customer needs as they do not have access to the information that are sitting elsewhere in a database back at the office.



This led to the expansion of Mobile Sales Force Automation.



Expansion in Portfolio of Capabilities

- 1. Quick Access to Information** – Imagine having outdated and inadequate information when you are in a sales call. Sales people should have critical facts and figures on the field that help them to close a deal. By providing the sales people with quick access and communicate information to and from the field allows the sales people to get the most from the time they spend with the customer.

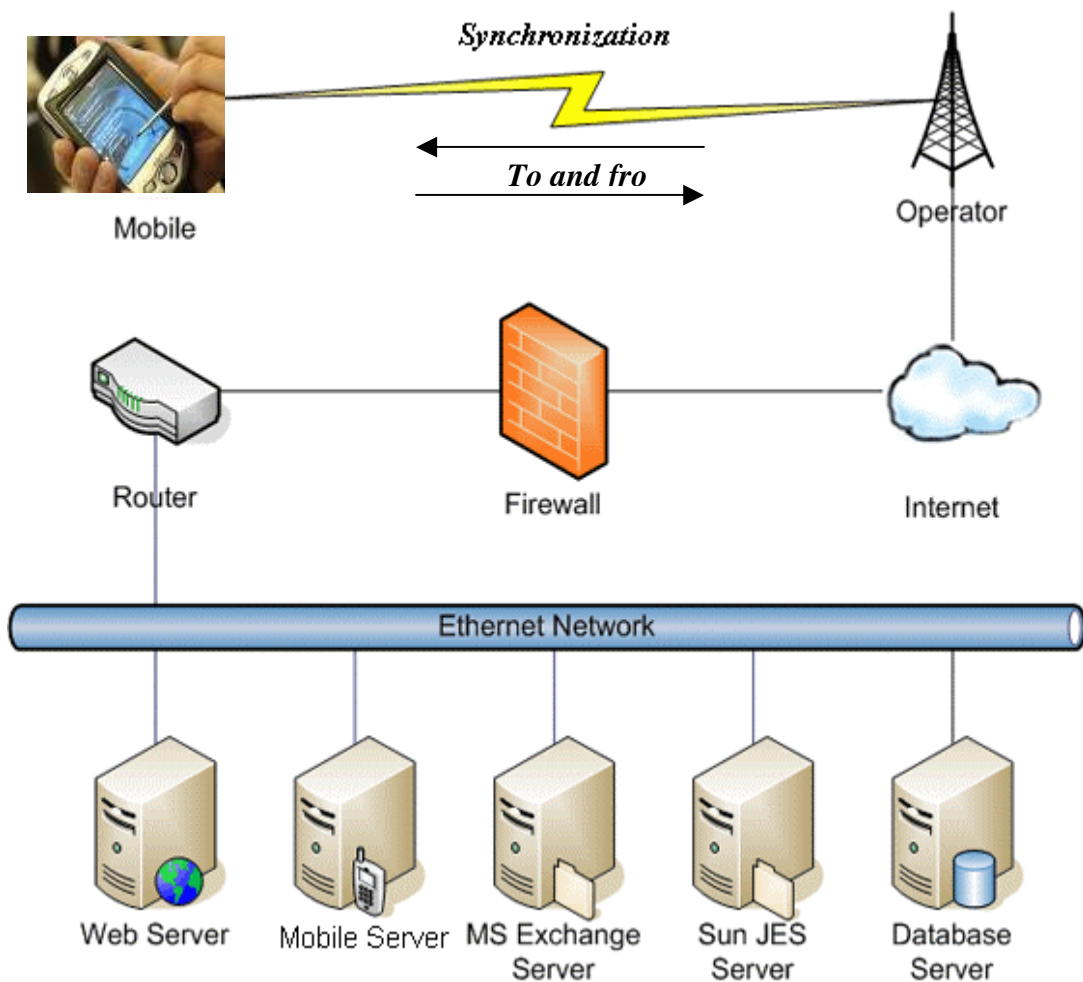


- 2. Shortened Sales Cycle** – Sales people can access current product information, check inventory and quote prices during a customer meeting which gives an outlook that they are very responsive. During the sales call customer can be informed about their accounts receivable status and credit standing with the push of a button. By using their mobile device the sales professionals can remove tedious tasks and reduce the delay in sending accurate information about customer meetings. Remote order entry capability also eliminates manual input of data into ERP. With these sales cycles are shortened, accurate information is gathered, customer is satisfied and revenue is increased.



- 3. Sync Capability** – Synchronization provides a simple method of sharing data and merging new and updated information between offline users and the Mobile Server. When the offline user comes online he should be able to retrieve the updated information from backend server through mobile server and the information in his mobile device should be updated with the backend server. This ensures timeliness and accuracy of the information.

The changes made outside the wireless coverage should be reliably conveyed to the backend. This ensures the sales professionals have most recently updated information and at the same time they need not reenter data again and again into the database. **For Example**, the corporate network of a major banking industry is designed to provide sales professional with reliable real-time access to their server. In a customer's place network coverage is not stable always, it gets lost. They need to use their mobile device and enter data as they interact with customer and then make that data available to the server as soon as the connection returns.



4. **Always On Sometimes Connected** – During sales call, sales professionals are in consistent time constraint. They need to deliver their messages efficiently as well as effectively so that they don't waste the face time with the prospects. The required boot of the laptop can waste a considerable amount of time in front of the prospect, which makes it less optimal. In such cases, sales professionals needs a mobile device which can help them access critical information in a small screen. "Always On capability is a must and the sales professionals can connect sometime to retrieve information." An efficient and powerful search capability is an important requirement.



5. **Security** – With the growing functionalities in today's SFA security plays a very important role. The primary security requirement is that all users should authenticate themselves as a verified user into the corporate systems. This ensures the sales professional accessing into critical information is an authorized user. And also an insecure connection or a lost device can cause a loss to company's proprietary data, in turn lowers competitive advantage. Mobility devices should have strong encryption capabilities for application data as it is transmitted over a network using a standard communication. A strong encryption system such as Triple AES (Advanced Encryption Standard) or DES (Data Encryption Standard) is necessary in ensuring the application data on the device is protected. In case of any lost or stolen devices, they should have the ability to remotely disable it.

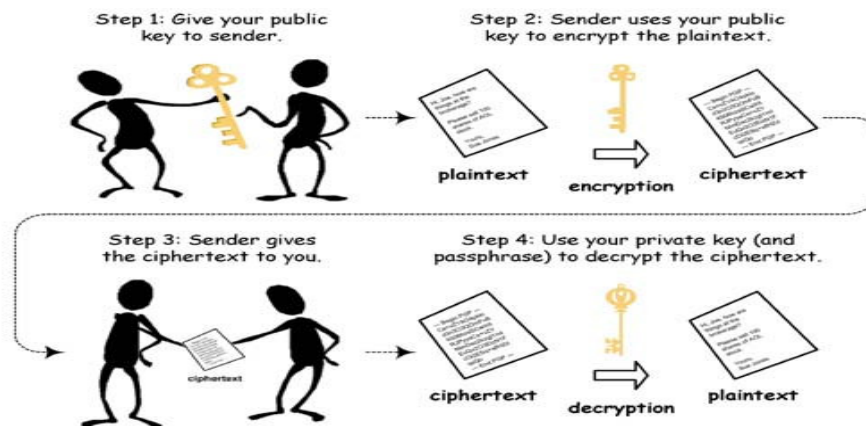
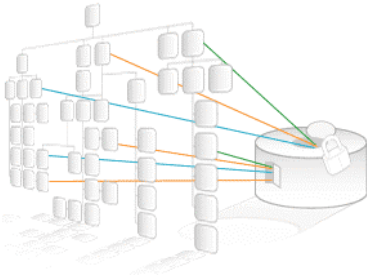


Illustration of how Encryption works

Drilling Down in CRM



Here are the examples of the kinds of questions a company should consider when looking at mobile solutions in Sales force automation.

Targeting and acquiring customers

- Would your field sales force benefit from an interactive segmentation tool to qualify prospects?
- Do Customers and sales professionals need to dynamically configure products and services from the customer location? For example, does your sales force need to be able to do on-the-spot financing?
- Does your field sales force need continuous ability to update and check inventory levels and pricing information?

Retaining Customers

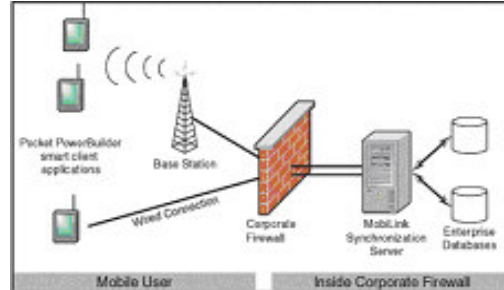
- Do you need to be able to alert field sales professionals immediately when there are changes in promised production schedules, delivery dates, pricing and more?
- Do you need the timely exchange of information among mobile operations, field service and field sales personnel?
- How do you currently connect customers with expert guidance and consultation? Could you do this more effectively with a mobile solution?
- Does it make sense for your customers to check the status of their own orders from any location?

Growing Customers

- Do you want to be able to alert field sales to cross-sell opportunities based on current interactions and historical trends for customers?
- Would it be productive for your products and services to wirelessly promote themselves at the customer premises?
- Should your mobile customers and field sales force be alerted to the need for updated products and services?

SFA Mobile applications open up new frontiers

Recent advances in both wired and wireless Internet access solutions have spurred faster growth of mobile sales force population in the last couple of years, with hosted applications promising to open up new frontiers. The following features emerged into SFA applications, assures companies to maximize its capability to effectively and efficiently manage mobile users and devices.



1. **Policy-based Management** – Can provide a way to allocate network resources, primarily network bandwidth and security (firewalls), according to defined business policies. Users can be defined as individuals, groups, communities, and have specific management capabilities applied to them. This can be easily changed, and can be tied to a directory.
2. **Broad functionality** – Can function with a wide variety of applications and data requirements. Most of the applications have the needed interfaces to allow customization and additions.
3. **Directory integration** – Can interface with already defined directory structure and policies so a stand-alone or duplicate directory is not needed.
4. **Scalability** – Can provide management for a large number of users with a large number of devices.
5. **Single console for all network/application/device/security** – can provide a single console from which it can define, control, deploy and maintain all aspects of the device, application, network and security.
6. **Web-based console** – can be managed from a web-based console from any standard browser, allowing management from local or remote locations, and on a variety of devices.
7. **Support for diversity in devices, platforms, and networks** – supports a variety of devices, connections and platforms, and will continue to expand on the device types and OS flavors.
8. **Security components** – Provides at least a minimum set of security capabilities within the product. Can be integrated with higher-level security tools.
9. **Bandwidth aware** – can adjust for whatever bandwidth is available for the particular connection (e.g., delivering massive file updates on a slow connection).
10. **Dashboard** – can provide a management dashboard of information on processes, users, devices, performance, etc.
11. **Backend management integration** – can integrate effectively with other back-end management infrastructure already deployed within the organization without needing to retrain existing staff already familiar with the application.

Emerging trends in Mobile Capabilities

Today, an assortment of technology is used by sales professionals, ranging from laptop computers to consumer-grade personal digital assistants (PDAs) to beepers and cell phones. These top features provide a solution for everything a sales professional may need while out of the office.

1. **Integration** – Ability to integrate with enterprise-level business applications.
2. **Operating System** – Defining a standardized OS environment has greatly eased deployment of devices. Much like the PC desktop environment, the ability to deploy a single platform to all users means allowing a uniform distribution of SW, and a consolidated support requirement. Can support Familiar Microsoft Windows Mobile-based operating system.



3. **Deployment platform** – Companies ultimately deploy applications on one of two major platforms: Microsoft .Net, or Java. However, many organizations will deploy both. Can run in either environment (e.g., running a JVM on a Windows Mobile device supporting .Net).
4. **Third party application availability** – Many application vendors now offer mobile extensions to their application suites, providing a convenient means of extending applications to a mobile sales professional. However, not all vendors provide such capability, nor do they support all platforms. Third party middleware extensions provide needed functionality when not available within the application.

5. **Asset Management** – Deploying devices to users is only part of the challenge. The greater part of the challenge is managing the deployed assets. Devices deployed in enterprise settings provide the appropriate tools to manage the devices adequately, even when used with a third party asset management application.
6. **Connectivity** – Companies are relying on the notion of the “real time enterprise” which requires up-to-date data acquisition of business activity information, as well as empowering employees with the data necessary to make the proper decisions. Mobile devices offer connectivity, even if not immediately used with the expansion of WiFi deployments within companies, as well as in public places. Can also allow a choice of radio connectivity options.



7. **Battery Life** – Battery life varies greatly depending on usage factor but the bottom line for most users is, can mobile devices get the user through the workday without a recharge? Most consumer PDA devices are challenged to provide a full day’s operation when using a wireless connection (WiFi). Can provide sufficient powerful batteries to provide at least one day’s operation, and allow full recharge overnight. Further, can provide field replaceable battery, as most batteries will only withstand about 300 charge/discharge cycles.
8. **Data Capture** – Data capture options provide linear and two-dimensional scanning or imaging.
9. **Voice telephony** – Voice telephony for push-to-talk (PTT), peer-to-peer (P2P), private branch exchange (PBX), one-to-one or one-to-many communications.



Future Technology Accelerators

Tablet PC



Tablet PCs combine the touch screen and handwriting features of the PDA with the computing power of a notebook computer in a compact and light weight design. End-user experiences the same look and feel in the office as in the field. Other advances in battery life and wireless capabilities are also eagerly anticipated.

Voice

Emerging technologies that allow natural text to speech dictation will allow easier data capture by both sales professionals and other members of the sales channel. Such services can run on mobile devices or via telephone services to a central server. Such solutions will tie directly into sales and marketing applications and can help increase the amount of useful data that can be captured in the field.



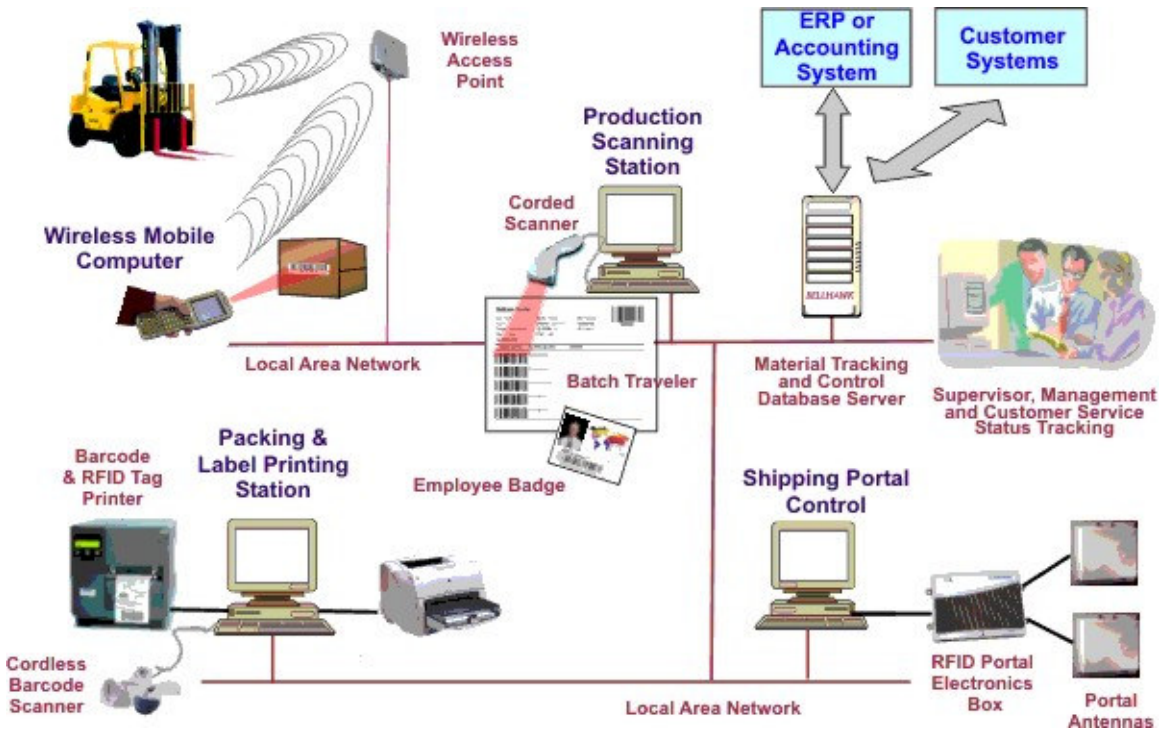
Extending into Field Analytics



As wireless networks improve, our ability to access information throughout the enterprise increases. Through integration of analytics into a mobile environment, we bring the sales professional in closer contact with the home office and help them to better highlight customer needs. We will be able to better measure and predict behavior and the interactions with the customer and, in turn, support changes in the business landscape, such as product launches and formulary changes.

RFID [Spell out] – Radio Frequency Identification

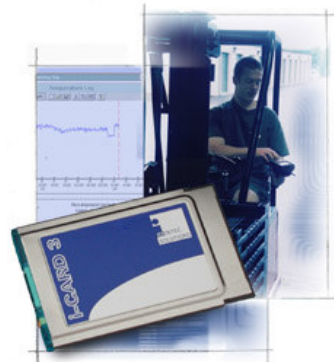
An RFID system comprises three main elements: electronic tags, tag readers and software to store collected data.



Sample RFID Architecture

The tags, which consist of a silicon chip and an antenna, provide each individual object to which they are attached with a unique identifier. When scanned, the tag transmits a wireless signal to the reader, which in turn sends the data to a database. The reader can also write information to the tag if required.

RFID technology is becoming prevalent in logistics where the movement of mobile tags, for example on pallets of consumer goods, is read by static readers, say, in goods in/out bays of a warehouse. However, for Sales Force Applications, this concept is reversed: the tags are static and the readers are mobile, i.e. carried by the sales professional. Tags can be attached, say, to a fixed location for proof of attendance, or to a specific item of machinery to be checked.



Top 5 reasons to make SFA MOBILE

1. Company conducts business in a national or global market.
2. Sales professionals spend more than 25% of the time out of office.
3. Business depends on quick and informed decisions from people who are frequently on the road.
4. Sales professionals need to have quick access to information and provide quick answers to the customers when they are on the call.
5. Nimbleness is a competitive advantage for the sales professional.



Challenge

A famous Banking company needed a robust tool for managing sales leads and opportunities with visibility of the sales pipeline. The company desired a web-based, customizable solution that would be a good fit with that company's mobility offerings to their sales professionals. It also desired a low-risk solution that could scale as the company grows. They also wanted their sales professionals to have up-to-date information about the leads they handle.

Solution

They selected ZSL's middleware technology for its wireless capabilities, ease of deployment, configuration and customization. Through ZSL's middleware technology the sales professionals were able to wirelessly access the provisioning functionalities such as sales order management systems and hosted prospect database. In addition, they were impressed with ZyPrism's ability to synchronize data's with reliable real-time access.

Results

Because of availability of data at real-time sales professionals were able to respond to customers at a quicker rate, shorten the sales cycle, increased their productivity and greater revenue generated. Because leads are pushed via alerts directly to sales professional's Mobiles, sales professionals started experiencing faster response times to people who register interest via the web or its sales call center.

About ZSL's Mobile Sales Force Automation

Even though there are a lot of challenges for mobile sales force automation, the good news is that ZSL is making mobility easier and safer, as well as more manageable, reliable and affordable for small and medium businesses than ever before.

Key features include

- Anywhere, anytime, any device Access to the business data.
- Task list or sales appointments browsing while on the go.
- Real Time sales and information update.
- Remote Status update.
- Pushing critical information over SMS or WAP Push.
- Offline or Disconnected area client to hold the data for later synchronization.
- Secured access to the corporate email, calendar and contacts.

Supported Devices:

- Palm OS based Handspring or Palm Devices
- Win CE/Pocket PC OS based Handheld
- WAP and J2ME Phones
- RIM's Blackberry Smart Pagers

ZSL realizes that salespeople are mobile by definition. ZSL uses technology to make sales team more focused and successful. ZSL's solution is customized in such a way that sales professionals get the direction they need and managers get the information they need. The bottom line is increased profits.



QUICK CHECKLIST: Deploying Wireless Apps

- Review business requirements for wireless deployment
- Evaluate device options
- Consider integration issues
- Develop for scalability, manageability
- Bake-in security



Source: Mobile/Wireless Deployment Issue
By Jack Vaughan and Peter Bochner, Searchdomino.com

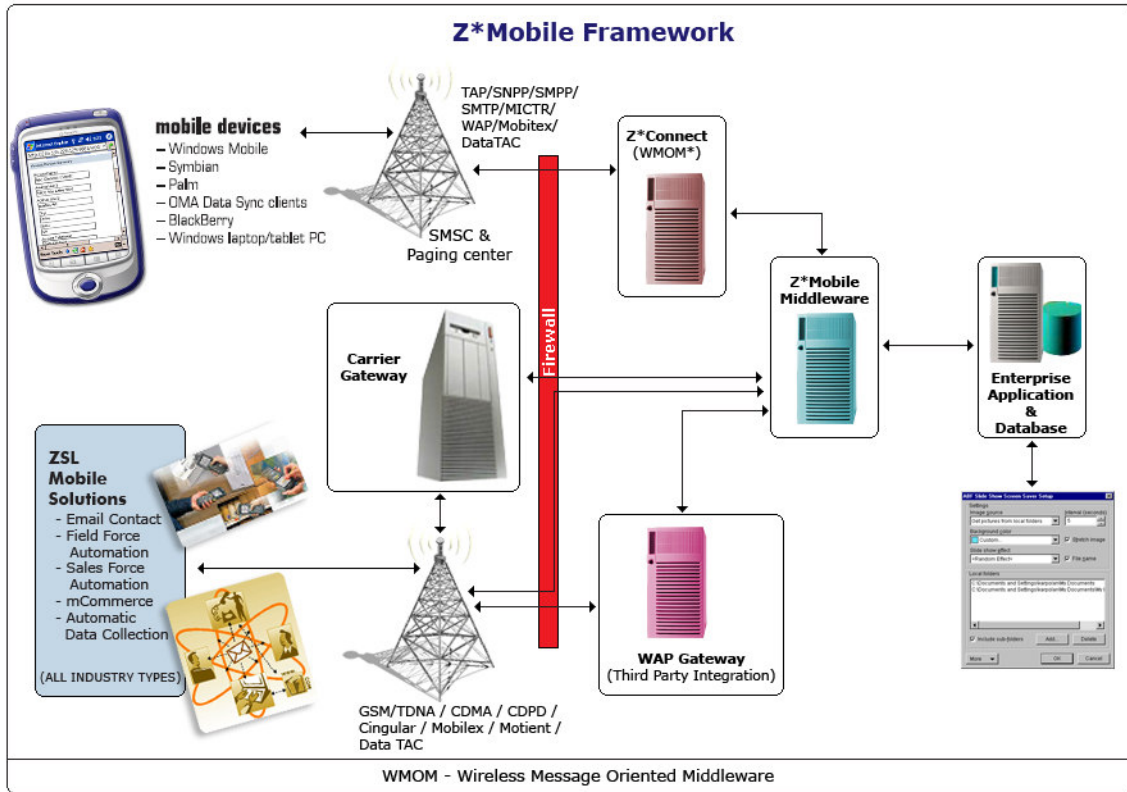
Conclusion

By providing quick access to information to sales professionals available at back-end data and applications helps them to shorten the sales cycle, gather accurate information, improves customer satisfaction and increase revenue. Sales professionals become more responsive to customers through expansion of capabilities in SFA.

With Synchronization feature in SFA sales professionals are equipped with real time and updated information, which in turn helps them to provide customers with up-to-date prices and inventory available. Remote order entry capabilities reduce the burden of entering the data again in the database residing at the server and help them to close the sale quickly and efficiently.

Business productivity and customer satisfaction can be achieved when mobile and wireless solutions are used wisely. Mobile solutions have truly come of age and can literally transform business to newer heights. Now is the time to evaluate how becoming more mobile sales professionals can be more productive. Its time to craft your mobile strategy otherwise your competitors are likely to go mobile giving them the competitive advantage.

Expansion in the capabilities of Sales force automation applications holds great promise for improving the efficiency of mobile sales professional and reducing the overall cost of sales. The enterprise network should be properly equipped to provide reliability, security, bandwidth, adequate remote connectivity and management controls. Mobility can give all the business advantages with these capabilities.



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