

White paper

Mobile CRM



Mobile customer relationship management on the rise

White paper - Mobile CRM

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1. Introduction

Efficient customer relationship management from anywhere

Modern customer relationship management is becoming more demanding. Companies are confronted with a flood of information in order to be able to target and connect with customers. Due to the huge popularity of mobile devices and the development of the broadband networks, the speed of communications continues to increase. Customers as well as co-workers expect increasingly quicker responses. Because the approaches to working have basically changed over the last few years, employees today need flexible access to important information: for customer appointments on site, for working in home offices and for business trips or presentations at trade fairs.

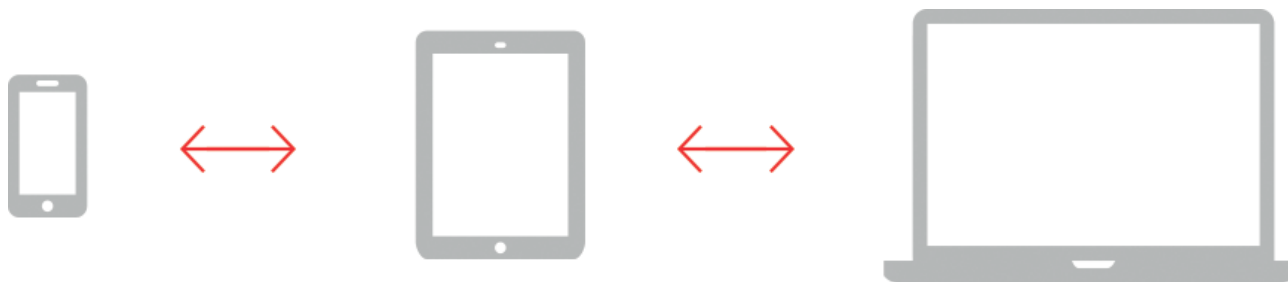
Stay competitive on the road with Mobile CRM

Customers and consumers demand mobile software solutions (mobile CRM), which can be quickly and intuitively used on the road and which can be custom-

ized to the individual requirements. Mobile management of contact data and information, acquisition and evaluation of data, depiction of processes and communicating with customers and partners represent an extension of the classic CRM systems on the workstations.

White paper – how to benefit the most from Mobile CRM

This white paper should provide the best possible support for your introduction into the topic of Mobile CRM. It includes current statistics and facts as well as an overview of the important advantages and a checklist with the specific requirements for a mobile CRM system. Two examples from companies, which are already using mobile CRM solutions in their daily work, will provide practical references. In addition, experts will reveal how to successfully implement a mobile CRM solution. Three selected mobile CRM specialists will have a look at current trends and future developments.



2. Statistics, data and facts

Studies prove that Mobile CRM is advancing fast

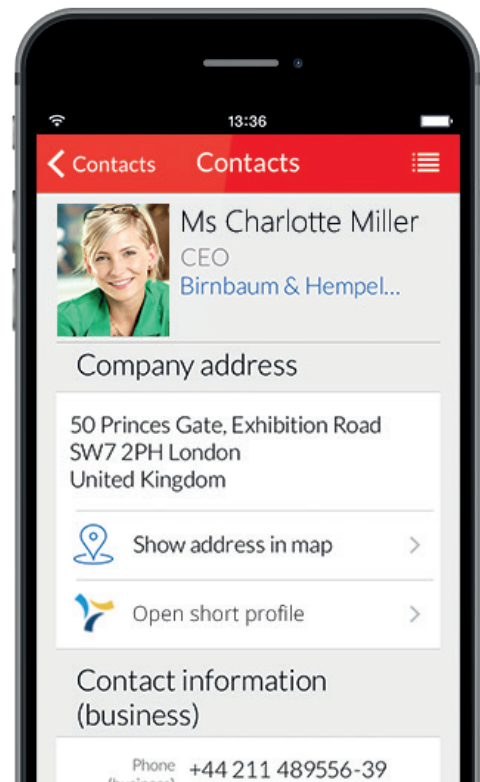
Mobile customer relationship management is becoming increasingly important. Current studies prove that mobile CRM is gaining increasing importance and is thereby becoming an integral part of modern professional customer relationship management. The interest in mobile CRM systems has doubled within one year according to a comparative analysis by ec4u expert consulting AG¹. Mobile CRM has also become the focus of Swiss companies. According to the Swiss CRM 2014² study of trends, 20,6% of the people responsible for CRM solutions identified mobile CRM as the current trend topic.

Mobile Support as a key factor when deciding on a CRM solution

A representative study from the independent market research and strategy company, Pierre Audoin Consults (PAC)³ confirmed these developments. With laptops, smartphones and tablets combined, 90% of the people polled are already using their CRM systems on mobile devices. Almost 70% even indicated that mobile support is a decisive factor in the selection of appropriate CRM software. The ability to use the mobile CRM solution on various devices is important to the users.

Focusing on customization and individual developments

Purely standardized applications are only being used by one tenth of the companies, because customization is becoming more important. In the next two years, 38% of the people polled want to invest in mobile CRM. 65% are planning to use a standardized CRM system application that will be extended using individualized adjustments, in order to meet the specific company requirements.



¹ <http://www.ec4u.de/2013-06-23/studie-mobiles-crm>

² http://www.crm-finder.ch/fileadmin/Daten/PDF/studien/ZHAW_Studie_Swiss_CRM_2014.pdf

³ http://bit.ly/MultiClient_MobileCRM MobileCRM The creation and distribution of the PAC Study was supported by BSI Business Systems Integration AG, Fujitsu Technology Solutions GmbH, SAP Deutschland AG & Co. KG and update software AG.

3. Advantages of Mobile CRM

How companies benefit from Mobile CRM

What additional value do mobile CRM solutions provide to business routines?
An overview of the six most important advantages



1. Work from anywhere

With mobile CRM, important customer and project information can be accessed at any time and from anywhere. This makes all of the relevant documents, brochures and data available at any meeting. Printing costs and paper piles are a thing of the past.



2. Respond quicker

Reaction times to customer and service requests immediately become shorter. With mobile CRM, contracts can be acquired and offers made in no time at all. Customer satisfaction will increase in the long term.



3. Work flexibly

With mobile CRM, for example, waiting and travel times can be used reasonably in order to document agreements immediately after the appointment with the customer. This makes work more productive and flexible.



4. Organize more efficiently

Business processes will become more efficient as administrative tasks can be completed more quickly. Telephone notes can be stored in the customer file immediately after the conversation, appointments arranged through mobile access to various calendar views or new tasks coordinated with the team.



5. Communicate more transparently

Data and information can be quickly stored and all employees across the company can access it. Knowledge about customers and projects is thus available for all team members so that everyone stays up to date.



6. Increase satisfaction

A well-informed team working hand-in-hand will ensure a positive business climate and a positive external appearance. The company image will also benefit.

4. Requirements checklist

The most important requirements for a Mobile CRM solution



The increasing number of mobile CRM solutions is becoming a challenge. Which aspects should companies consider when selecting their solution? The following checklist summarizes the most important requirements for a mobile CRM solution.



Support for all popular smartphones and tablets on the market

Mobile CRM solutions should flexibly adapt to different users and scenarios. The mobile CRM solution is to run on all popular devices, regardless of whether this work involves preparing for customer appointments with a laptop in the home office, recording sales meetings on tablets at trade fairs or accessing contact data through smartphones for a phone call on the road.



Individual adaptation

A marketing employee will place different requirements on a mobile CRM solution than a human resources employee. A marketing department manager will access different CRM features than a consultant. For these reasons, the mobile CRM solution must be able to adapt to the individual needs and types of users.

The most important requirements for a Mobile CRM solution



Cross-platform design

Often, different devices and operating systems are used in a company. Not least of all because many employees are using their personal smartphones or tablets for business purposes. Whether on iOS, Android, Windows or a browser, the look and feel of the software interface should be the same on every operating system and automatically adapt to the various display sizes of the devices. This will increase user acceptance of the mobile CRM software and users will deploy it across all devices.



Simple and intuitive operability

The structure and user navigation of the software should be self-explanatory so that the user can quickly start working with the software without a long learning curve. A good mobile CRM solution will distinguish itself through intuitive operation both with the keyboard and the mouse as well as by touch and multi-touch features.



High security standards

To prevent security leaks during the transmission of sensitive customer and project information or loss of the device, the mobile CRM solution should comply to high security standards, such as the SSL encryption technology and secure user authentication. Furthermore, Mobile Device Management (MDM) accessible systems should be available.

5. Mobile CRM best practices

Mobile CRM in everyday business

Focusing even more heavily on the customers and their needs and controlling marketing activities more efficiently; these are two of the significant advantages of mobile CRM. Companies that have already been using mobile CRM software for several years are reporting on their practical experiences.

Almdudler is expanding internationally with mobile CRM

Planning visitor tours, preparing appointments flexibly and evaluating them afterwards and even accessing all data in skiing lodges. “With the CAS genesisWorld app, co-workers are booking new contracts directly at the customer site and documenting the agreements. The orders are then immediately forwarded to the main company. This attentive service is impressing our business partners”, reports Sabine Steindl, the Financial Project Manager at Almdudler.

Modern data and flexible customer relationship management at Ebner Stolz Mönning Bachem

Ebner Stolz Mönning Bachem has already been using the CAS genesisWorld mobile CRM software successfully for several years. The auditing and tax consultancy company can ensure their customers flexible consultancy and even meet demanding requirements. The particularly user-friendly operation of the software, the seamless integration with all systems and the flexibility of mobile access have been named as core advantages and opportunities by the customer. “This new approach to working is more efficient, transparent and intelligent than ever before”, reports Daniel Gleichauf, who works as the Systems Administrator and CRM Project Leader at Ebner Stolz Mönning Bachem.



6. Successful implementation of CRM

Practical tips: how to implement Mobile CRM successfully



Alexis Kälin (Artwin AG) and Marcus Bär (CAS Software AG) have supported companies for many years in the successful implementation of CRM systems. In the following interview, they explain the issues that need special attention when implementing mobile CRM solutions.

Where should companies focus their attention in particular when implementing Mobile CRM systems successfully?

Alexis Kälin: First, the requirements for a mobile CRM system must be precisely defined and afterwards it must be checked whether the solution meets these requirements. In addition, it is particularly important to include employees who will be working later with the mobile CRM system from an early stage on. It is best to talk openly about the effects and benefits so that all participants can be better included in the use of this new work tool. I recommend to allow the employees to decide, when possible, which end devices they would like to use. This will promote acceptance tremendously.

Practical tips: how to implement Mobile CRM successfully



Marcus Bär

“It doesn’t matter which device users access – thanks to the intuitive operability, they are familiar with the interface and can work more efficiently than before from anywhere in the world.”



Alexis Kälin

“In order to promote acceptance of mobile CRM systems, employees should be taken on board as early as possible.”

Marcus Bär: For successful implementation, lean processes between external and internal services should be determined throughout the system. It is also important to focus on the significant details and only provide access to the most important customer and project information to implement the mobile CRM solution as lean version of the standard CRM version.

What is the biggest challenge?

Marcus Bär: Conveying the advantages of mobile CRM to the employees is both a challenge and an opportunity. The introduction and routine use of the mobile CRM system must be designed so that the employees can experience and feel the added value of the mobile data use. Based on the content, this is the biggest challenge. The biggest technical challenge lies in the infrastructure and security of the data. To minimize the risks when losing the device, we recommend to access important CRM Data online.

Alexis Kälin: The biggest challenge is clearly acceptance by the employees. This will only happen when the added value of the mobile CRM software becomes clear. To accomplish this, the solution must be technically mature and user-friendly.

Which expectations do your customers have on mobile CRM in the future and which do you consider important for the success of future mobile CRM technologies?

Alexis Kälin: A mobile CRM system must provide real benefits and the current (as well as future) technologies must cleverly support the end devices. Usability will play a very important role in this. Users must be able to work with and intuitively use a good mobile CRM system without further training and practice.

Marcus Bär: Regardless of which device users access, they will want to feel at home in their mobile CRM system and find the same interface as well as the same functions everywhere.

7. Expert statements about the future

An outlook: Trends in mobile CRM



What will be the requirements for mobile CRM software in the future? How will mobile CRM affect our purchasing and selling behavior? How will the mobile CRM user of the future look and which standard media will be used over the medium and long terms? Three experts answer to trends and developments in the field of mobile CRM computing.



“The question is no longer who is particularly interested in mobile CRM, but rather who can get along without it.”

Georg Blum

1A Relations GmbH, Ebersbach

The majority of CRM users will (have to) deal with mobile CRM solutions in the future and do so in almost all work-related situations and circumstances of life. Even now, many have become accustomed to the ability to access important CRM information quickly and easily via smartphones not only when on the road or on site at the customer's offices but also in internal meetings. The question is no longer for whom mobile CRM is becoming increasingly important, but rather who will be able to do business without it in the future.

The decisive factor for success is that the mobile CRM software of the future will have to fulfill various user requirements as best they can. For example: the easier and more intuitive the application is, the greater the acceptance, thus ensuring an efficient use in day-to-day business. Quick transmission of data and offline synchronization will also be important factors. In addition, seemingly identical execution of the software on the broadest variety of platforms or operating systems must be ensured.



“A mobile CRM solution should be self-evident to a field service team, which relies on contemporary customer relationship management.”

Prof. Dr. Peter Winkelmann

Landshut College for Applied Sciences

The question of mobile CRM usage is currently concentrating above all on how field service teams can get technical support independent of time and location. Anyone who will rely on contemporary customer relationship management in the future will consider the use of mobile CRM systems on tablet PCs to be self-evident.

The effects of mobile CRM use on the purchasing possibilities and the behavior of private, and in part commercial, end consumers is currently not being taken into consideration. Mobile devices with integrated

cameras and GPS location finders will open a multitude of opportunities for initiating new customer relationships, above all in built-up areas and cities. Advertising information related to the location can already be transferred to tablets and smartphones and create a new form of purchasing as well as customer loyalty. Of course, an information flood that is too large will lead to a loss of attention or even rejection. If we succeed in sensitively preparing customers to the intelligent mobile customer touch points, the new forms of mobile CRM will drastically change our purchasing and selling behavior.



“Following the principle of ‘Sharing, not Distributing’, mobile CRM will fundamentally change the entire culture of communications and presentations.”

Ludwig Neer

CTO at CAS Software AG, Karlsruhe

The mobile CRM users of the future will use their CRM solutions on several mobile devices and share all of their data with the business and project partners on a shared platform. The new form of the culture of collaboration will stand for “Sharing, not Distributing”. Mobile CRM will fundamentally change the entire culture of communications and presentations.

Hybrid devices, meaning mid-sized tablets, will prove themselves over the medium to long term as standard media for mobile CRM usage. Smartphones will continue to be present however will only be relevant for

telephone calls, appointments, addresses and basic applications. Which additional developments will arise in the future will also depend on the changes in the communications culture. People used to make phone calls in meetings; today this is no longer done. Laptops were used in customer meetings; today tablets are usually the medium of choice.

We know now: premium solutions must work on all popular mobile platforms in the future. Natively developed apps and a consistent operational design will be crucial for success and user acceptance.

8. About CAS Software AG

As the German market leader for CRM solutions for small and medium-sized enterprises and a pioneer of xRM, CAS Software AG develops market-leading software solutions for (customer) relationship management in companies and organizations. Established in 1986 by the present board members, Martin Hubschneider and Ludwig Neer, this company in Karlsruhe is involved in numerous networks and research projects. Worldwide, 250,000 people use the solutions that have received multiple awards. The software manufacturer's goal is to be the European market leader for CRM and xRM solutions for small and medium-sized enterprises.

Free Webinar about Mobile CRM

Would you like to learn more about the exciting topic of Mobile CRM? CAS Software AG is offering you a webinar about the topic of Mobile CRM. In this webinar, you will get a quick overview of the features and benefits of CRM software solutions. Learn more about mobile CRM and about the webinar at: www.cas-crm.com/mobile

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