Mobility for enhanced productivity

November 13, 2014
Welcome!
Important Web Seminar Notes

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What's your industry classification?

Polls are open.

- Manufacturing
- Distribution
- Retail
- Health Care
- Not-for-Profit
- Professional Services
- Other

[Poll 1]
Today's Presenter

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Agenda

- Benefits of mobility in the workplace
- Benefits of Microsoft Dynamics CRM Mobile
- A Look at Microsoft Dynamics CRM Mobile
- Microsoft Dynamics CRM Mobile Success Stories
- Microsoft Dynamics CRM Mobile integrating to other applications
- Reasons people are using Microsoft Dynamics CRM Mobile
- Q & A
Does your organization have a mobility strategy?

Polls are open.

- Yes, we have a strategy but not yet implemented
- Yes, we have a strategy and it's executed but not integrated with our CRM system
- Yes, we have a strategy that's executed and integrated with our CRM system
- No but we have plans
- Don't know

[ Poll 2 ]
Benefits of mobility in the workplace
Why mobile technology

- The integration of mobile devices such as laptops, tablet computers, PDAs and smartphones, along with their various applications and software, make it easier than ever for workers to collaborate and businesses to communicate with staff, customers, and vendors.

- Mobile technology allows people to use company data and resources without being tied to a single location. Whether your staff are travelling to meetings, out on sales calls, working from a client’s site or from home anywhere on the globe, mobile devices can help them keep in touch, be productive, and make use of company resources.
Industry experts weigh in

- “Work is an activity; not a place,” says Phil Go, chief information officer at Dayton, Ohio-based Woolpert, Inc. “We’re eliminating the barrier of having to be in a physical office to be productive.”
- Workforces are trying to standardize technology - In 2017, according to the Forrester study, nearly one in five tablet purchases will be made directly by companies. That is roughly 68 million tablets in the workforce – P. Gownder, vice president and principal analyst at Forrester Research
- Challenges for IT will be wireless networks, infrastructure and network security and mobile applications
Departments benefiting from mobility

- Sales Teams
- Marketing
- Management
- Customer Service
- Project Management
- Finance

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All Businesses are offering mobile solutions for their employees

Mobile technology solutions may include:
- Infrastructure
- Website and/or application development
- E-commerce solutions
- Marketing solutions and CRM
- Communication solutions like Dynamics CRM, NetSuite, SharePoint
- ERP solutions (Dynamics GP, Dynamics AX, NetSuite)
- Customer relationship management (Dynamics CRM, NetSuite)
- Technology hardware and software management solutions
- GPS tracking solutions
- And much, much more

All Businesses are offering mobile solutions for their employees
Benefits of Mobile CRM
What is CRM?

- Customer Relationship Management (CRM)
- Mobile CRM is a business strategy
- Microsoft Dynamics Mobile CRM is a software tool that allows businesses to manage a Mobile CRM philosophy
- Implementation of a Mobile CRM system may result in changes and optimization of business processes – use this as an opportunity for continuous improvement and productivity!
Mobile CRM

- Mobile CRM allows you to do anything you can do digitally at your office, you can now do it on the go!
- As security and IT issues are solved and get even better in the cloud, more companies will feel comfortable going to Mobile CRM
- Works well for many types of businesses
- Ease of use and familiar to Microsoft Office users – leverage your Microsoft Applications
- High rate of user adoption
  - Self-service and familiarity with Microsoft Applications
- Microsoft R&D
  - Long-term support and product direction
  - Clear roadmap so you know your investment is secure
Mobile CRM leads to better sales and productivity

- 55% of all Internet traffic took place via mobile access (comScore, Inc, Jan. 2014)
- 65% of sales reps at companies using Mobile CRM have achieved sales quotas (Innoppl Technologies, ‘Year’)
- That number drops to just 22% for companies that have not implemented a mobile strategy (Innoppl Technologies, ‘Year’)
- Sales have been shown to increase 29% and even higher for those using Mobile CRM
- Productivity has been shown to increase up to 34% and boost forecast accuracy up to 40%

Mobile CRM leads to better sales and productivity
Pros of Mobile CRM

- Effectively manages the customer lifecycle – from marketing to sales to service
- Out-of-the-box functionality yet highly customizable/adaptable
- Various methods of deployment
  - Outlook
  - Mobile
  - Browser
  - Cloud

**Fits your people**
The right user experience for every user role

**Fits your business**
Configures quickly to meet your specific needs

**Fits your environment**
Deploys quickly and integrates existing assets

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Ways businesses are using Mobile CRM to increase sales productivity

- BYOD (Bring your own devices) allows sales people to use their own phones and tablets in the workplace
- Integration with back office systems (ERP systems, SharePoint etc.)
- Role Based user interfaces
- Staying informed via social media
- Intra-office collaboration
- Using Mobile CRM to “close the deal”
- Using more types of mobile devices (Surface, Tablets, iPads, iPhones, Androids, Windows Phones, Laptops)
Mobile CRM leads to better sales and productivity

- Increased Productivity through more device option
- More engaged sales teams and more sales opportunities
- Improved Customer Service and Experiences
- Improved understanding of collective information
- Mobile CRM has a great ROI – according to Nucleus Research CRM has an average ROI of $5.60 for every $1 spent
How sales is utilizing Mobile CRM

- To support their Pipeline end to end, in today’s mobile market
- Marketing is automating demand generation directly routing leads to sales reps’ mobile devices
- Sales and BDM managers are reacting in real-time to engage or ‘jump in’ to help close deals, same day
- Everyone around the board (on the team) is collaborating instantaneously with Yammer, comment feeds via tablet.
- Reps are prioritizing on the go with activity feeds and connecting via Skype/Lync technologies
- Native Bing Maps integration gets reps to their destinations on-time
- Access to your SharePoint library allowing for easy proposal creation
A Day in the Life of a Sales Person (it's not always a traditional office anymore!)
What CRM system does your organization use today?

Polls are open.

- Microsoft Dynamics CRM
- NetSuite
- salesforce.com
- Siebel
- SAP
- Act, Goldmine or other
- No CRM

[ Poll 3 ]
A Look at Microsoft Dynamics CRM Mobile
Microsoft Dynamics CRM Mobile accessibility
A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity

STARTING YOUR DAY

- Catch up on News and Social Media Trends
- Respond/Send E-mails and update Calendar Schedules

A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity
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**TRAVEL TIME TO CLIENTS & PROSPECTS OR SERVICE CALL**

Review Leads and Opportunities

Review Meeting Agendas & Client Notes

A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity
A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity

CLIENT/PROSPECT MEETINGS OR SERVICE CALL

A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity
A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity

TRAVEL TIME TO AIRPORT, OFFICE OR HOME

A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity
A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity

AIRPORT, OFFICE OR HOME – WRAPPING UP DAY

Sales
What's New

My Pipeline

Activ

A day in the life of a salesperson – How Microsoft Dynamics CRM helps increase productivity
Microsoft Dynamics CRM Mobile – Success Stories
One of the largest manufacturers of wheelchair van conversions, we take great pride in building leading-edge mobility products that meet the needs of our customers. With a genuine care for the disabled community as our driving force, we have been constantly innovating and working to improve our products and our service throughout our long history.
Sales, call center and service departments

- Customer calls Call Center looking to buy a van or have modifications done to current transportation. Call center can instantly look at original van purchase and order history on the Customer Form in Microsoft Dynamics CRM Mobile or put information in as a new lead and route it immediately to sales.
- Salesperson gets an alert on their phone while traveling to client site and can call the customer back right from the Microsoft Dynamics CRM Mobile Lead page on their phone. They can also create an opportunity or service call and update the record right from the smartphone or tablet.
- Sales Rep can see if the client is in the area with the map feature in Microsoft Dynamics CRM Mobile and make a personal visit.
- End result is more time to listen to the client on-site because the rep had access to all of the information real-time.
Sales, call center and service departments

- The company was able to eliminate a trip back to the office to review 'what needs the client was communicating.'
- That was all done in real time. The rep closed the deal on-site and sent the order through for processing.
- In Outlook the Rep sets the email order regarding the Opportunity (the Rep can even create the opportunity from scratch using quick forms or with 'a one click conversion process' on the lead assigned.).
Case study: Governments utilizing Mobile CRM

- Cases, a record that helps with just that Case Management is now available via the CRM Mobile app on your Windows Surface RT (or other devices)
- Case workers in the field provided with a tablet at our most recent engagement IN FSSA have eliminated the sheer weight carried in paper files
- From a tablet they work along left to right in the Case Management Process in Microsoft Dynamics CRM Mobile Application

- Completing the associated tasks for that stage of the 'process'
- **Notice this Inquiry is Active and in the Assessment stage**
- Inbound reps accept inquiries and perform assessments, through a demographic screening process. If they find they can help someone they create them as a consumer and begin putting together a service plan.
- This may involve trips to the individual's home and the need to access multiple providers services in real time
Microsoft Dynamics CRM Mobile integrating to other applications

Microsoft Dynamics CRM Mobile integrating to other applications
Sales is utilizing Microsoft Dynamics CRM Mobile integration with Outlook
Sales is utilizing Microsoft Dynamics CRM Mobile integration with Outlook
Sales utilizing Microsoft Dynamics CRM Mobile by tracking and “Set Regarding” feature in CRM

- The Set Regarding feature is known to be one of the more powerful tools Microsoft Dynamics CRM offers by way of simplicity of use across all interfaces.
- This is allowing sales managers to use reporting features that show or communicate the true ‘Touch-point Map’ between the company and client.
- No longer are sales managers asking only win or loss, they are feverously digging deep into ‘how we connect with our clients.’
  - How did we generate this lead (existing account and/or source campaign)?
  - How many times did we communicate? And on what platform(s) (Phone, Email, etc.).
  - How many times did we have a face-to-face meeting? Demo?
  - If we won which products were pitched on the offer but were not sold (product/package review).
  - If we lost, is there a pattern within recent losses that we can analyze to make adjusts.
Sales utilizing Microsoft Dynamics CRM Mobile and Microsoft’s integration with Microsoft Stack

- Launching SharePoint from a Dynamics CRM Opportunity (or other records)
- Its quick and easy and allows reps to create a collection of proposal documents from organization templates.
- You can then route documents for approvals or revision, attach documents right to your proposals and your Dynamics CRM records
- Export data to Excel for Pivot Tables and other reporting
- Integrate with Microsoft Dynamics GP or AX so that your sales force has access to credit information, recent order history, etc.
Sales is utilizing Microsoft Dynamics CRM integration with Skype

- Now it has made its way into the hands of sales reps. Supporting their need for an immediate one touch connection to potential clients.
- Click dialing directly from the lead opens the Skype app in a convenient dual column view.
- Reps are using this along with lead scoring to seamlessly prioritize and call leads
Sales is utilizing Microsoft Dynamics CRM integration with Skype for ‘one-touch” calling.

Log phone calls while you talk

In Windows 8, the Skype app automatically snaps to the CRM app when you start a call. Resize the apps if you want, and add information about your call while you’re talking.

Sales is utilizing Microsoft Dynamics CRM integration with Skype for ‘one-touch” calling.
Sales utilizing Microsoft’s Mobile Phone App

- Microsoft’s mobile vision for Dynamics CRM is extensive
- Here are one-touch call and email options as they look from the phone app.
Sales utilizing Microsoft’s Multi Channel Service for Microsoft Dynamics CRM Mobile

Multi-channel service

- Seamless multi-channel experiences across web, social, mobile and chat.
- Consistent and contextual interactions no matter what channel the customer chooses.
- Proactive Chat experience
- “EasyAnswer” maximizes self-service success by recommending articles before case submission.
Why should you choose Microsoft Dynamics CRM Mobile

- Increase sales team productivity
- Build stronger customer relationships
- Reduce costs
- Enhanced communication
- Easy access to lead intelligence
- Get organized
- Complete view of your customers
- Improved sales reporting
- Bringing the field staff closer to the team
- Increase customer satisfaction
Dynamics CRM Mobile Leads to better Sales & Productivity

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Are you planning to move to a now-generation business application?

Polls are open.

- Yes, within six months
- Yes, between six months to one year
- Yes, more than a year
- No plans
- Don't know

[ Poll 4 ]
Q & A

- Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button.
- The slides and recording of this call will be sent to attendees for today’s program.
Learn how new technology platforms can change how you do business

- Now-generation business application series continues
  - Actionable data on Nov 17
  - Collaboration in the cloud on Nov 18
  - Automating exception management on Nov 20
- Register at www.mcgladrey.com/events
Thank you for attending

- The presentation slides and a link to the call recording will be sent to all participants within a few days of the webinar

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Thank you for attending