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# Best Practices: The Right Way To Implement Mobile CRM

by William Band  
for Business Process Professionals



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Adopt Mobile Solutions To Empower Employees And Drive Productivity

by William Band

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### EXECUTIVE SUMMARY

Business process pros that support customer-facing employees agree: The primary value of mobile customer relationship management (CRM) is the ability to access and update business-critical information while employees are on the move. But three corporate constituencies — IT executives, business decision-makers, and employees — each have specific and sometimes conflicting goals and requirements driving their mobile device and application initiatives. Based on interviews with 25 business and IT professionals, CRM solution vendors, and professional services organizations, this report defines five key mobile CRM best-practice strategies and describes more than 50 tactics to make them stick. The most critical? Understand users' roles, information needs, and daily tasks and then pinpoint the use cases where mobility solutions can drive practical business value. Use the self-diagnostic tool to identify your best opportunities for success and foresee the pitfalls to avoid.

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### NOTES & RESOURCES

Forrester reviewed our latest research on mobile technology trends and interviewed 25 vendors, professional services organizations, and user companies.

#### Related Research Documents

["Vendors Seize Emerging Mobile Cloud Service Opportunities"](#)

May 2, 2011

["Trends 2011: Customer Relationship Management"](#)

January 26, 2011

["Define Your Mobile Development Strategy"](#)

August 24, 2010

## MOBILE CRM ADOPTION REACHES A TIPPING POINT, BUT CREATES NEW CHALLENGES

A wide range of mobile devices and applications are making their way into enterprises through corporate-approved channels, as well as via employees who bring their own devices to the office. Many companies are expanding their mobile application deployment initiatives to reach employees, partners, suppliers, and customers, often using a variety of different mobile device operating systems (OSes).<sup>1</sup> Mobility has become a key corporate priority. For example, a recent Forrester survey found that 47% of firms said that supporting more mobile devices, such as smartphones, was a critical or somewhat critical telecom priority for their company, and 49% of enterprises identified supporting more mobile applications for out-of-office users as an important telecom initiative for their firm in the coming year.<sup>2</sup>

In particular, the ability to use handheld mobile devices to support customer-facing workers like sales contacts and customer service activities in the field has clearly moved beyond its previous status as a specialized nice-to-have option and into the mainstream. The emergence of ubiquitous high-speed broadband connectivity, smartphones, and tablet devices with enormous computing power and longer battery life, along with increased employee adoption of touchscreen devices like the iPhone, iPad, BlackBerry Torch, and BlackBerry PlayBook in every sphere of life, are all trends that serve to liberate IT from the desktop. According to Destination CRM, 44% of companies plan to grant access to their CRM systems via mobile devices.<sup>3</sup> And in a 2011 BearingPoint survey, organizations reported that mobile CRM delivered significant improvements in key metrics, including a 60% increase in customer satisfaction, a 30% increase in sales, and a 30% increase in productivity.<sup>4</sup>

### Mobility Empowers Customer-Facing Employees In The Field

Laptops and hardened proprietary devices may be adequate for mobile customer-facing employees, but they're also expensive, aren't always on, and may not have constant connectivity or GPS support for location awareness. Mobile applications offer a great way to send and receive time-sensitive or location-specific information when that data is most valuable and most likely to be accurate and complete.<sup>5</sup>

The new generation of OSes, such as iOS, Android, and Windows Phone 7, combined with advances in mobile software development kits (SDKs), provides effective tools for quickly developing reliable mobile applications with a rich user experience at a lower cost. Our interviews with user companies, mobile solution vendors, and professional services organizations spotlight that the customer-facing business activities (use cases) that create the most value by being "mobilized" revolve around the ability to access and update business-critical information while on the move. For example:

- **Contact and account information.** In the B2B financial services, high-tech, retail, and manufacturing industries, making basic but up-to-date, contact, account, and product purchase data available to sales representatives in the field for call planning and preparation purposes is a high-value use case for mobile CRM solutions.

- **Lead, opportunity, and prospect management.** Mobile sales representatives need access to company information in the field, but mobile solutions can also improve productivity by making it easier to collect and transmit information back to the head office. Organizations in the B2B financial services, manufacturing, and high-tech industries value quick call-reporting capabilities via mobile devices to improve sales lead and opportunity management.
- **New order generation and inventory updates.** Mobile solutions can speed the order flow in industries like retail or retail distribution, where salespeople generate new orders during customer visits and/or replenish customer inventories. Reps can use mobile devices to count inventories and transmit this information back to the head office to trigger a restocking order. Or they can create a new order, capture a customer approval signature, and transmit the order instantly while in the store, dramatically reducing order cycle times.
- **Field service and repair.** In manufacturing and high-tech industries, field engineers are using mobile CRM solutions at customer sites in offline mode for managing activities, debriefing, taking measurements and readings, and capturing customer signatures for confirmation of service jobs. Once they leave the customer site, they synchronize their data with the corporate servers, which updates customer profile information and triggers follow-up events like the next visit or action items like ordering or parts deliveries.
- **Product demonstrations.** In the life sciences industry, medical representatives spend 75% of their time visiting physicians, pharmacies, and health management customers and are rarely in the office. They use mobile devices to maintain up-to-date contact information, product details, sample lists, and promotion details. They are increasingly using mobile devices — in particular, taking advantage of the compelling visual display capabilities of tablets — to present findings from clinical trials to medical professionals or demonstrate product usage.
- **Facilitation of approval workflows.** Mobile devices also support managers across operational groups in sales and marketing to complete workflow approvals in near real time, speeding the decision-making cycle. This is particularly prevalent in the B2B financial services, high-tech, and manufacturing industries.
- **Analytical dashboards and alerts.** The top management of companies in industries like investment banking and retail demand access to dashboards to track business results while they are on the move; they also want alerts to be pushed to them instantly for quicker and better decision-making.
- **Integrated customer self-service.** Consumers also want to be able to interact with the organizations they do business with through the increasingly ubiquitous personal mobile devices as part of their mobile lifestyle. This includes the ability to use mobile devices to register products, locate stores, create support tickets, and receive value-added services and incentive offers.

- **Mobile marketing.** eCommerce companies that Forrester surveyed in mid-2010 expected 2% of their online sales to be transacted via mobile. eBay alone expects to see \$2 billion in business transacted via mobile — up from \$400 million in 2009.<sup>6</sup>

### Tension Between Corporate Stakeholders Creates Mobility Challenges

Decision-making about when and how to deploy mobile solutions is becoming ever more complex due to the fast-accelerating timelines for the release of new types of mobile devices and applications. Despite the high interest in enterprise mobility solutions, three corporate constituencies — business executives and decision-makers, IT executives, and employees — each have specific and sometimes conflicting goals and requirements driving their mobile device and application initiatives.<sup>7</sup> Also at stake is the need to manage requirements to ensure the security of the devices, applications, and data that enable mobility solutions. The different agendas of key stakeholders include:

- **Business execs push mobile requirements to increase employee productivity.** The need to improve employee productivity drives business decision-makers toward mobility. Business execs look for ways to provide employees with mobile devices and applications to help them complete work activities and business processes more quickly and efficiently. These mobile applications often address the specific needs of business functions such as sales or field service.
- **IT executives want to control the fragmented corporate mobile environment.** As IT organizations focus on controlling the fragmented mobile device and application landscape, they prefer to support a shortlist of corporate-approved mobile devices and applications. These mobile solutions also need to be scalable and standardized, as well as delivered in a secure, cost-effective manner. IT execs are also trying to keep mobile application development and testing costs from spiraling out of control.
- **Employees want the flexibility to bridge work and personal activities.** Employees increasingly influence corporate mobility decisions because they bring personally selected mobile devices into the office and use them to complete work activities like accessing their email and calendar.<sup>8</sup> Employees want the flexibility to select their own mobile devices, whether or not these devices are on the corporate-approved list. Employees also want to use these mobile devices for both personal and professional purposes.

### The Solution Landscape For Mobile CRM Is Extremely Complex

The state of mobile CRM solution support is fragmented.<sup>9</sup> While there are platforms and solutions that cater to specific industries, no mobile CRM vendor currently offers out-of-the-box cross-industry functionality. The gap between the functionality available via desktop and mobile CRM applications is far from being bridged. And vendors sometimes adopt a single-device or single-OS strategy, limiting the range of devices and OSes available to companies. Assembling all of the components of an effective mobile CRM solution to meet the precise use case for a specific type of mobile worker requires navigating a complex set of decisions. Business process pros involved in mobile projects need to consider:

- **A range of CRM vendor solutions.** All of the leading CRM application vendors that focus on large enterprises support mobile access to their applications, and they are racing to upgrade their capabilities to keep up with the new form factors that mobile workers demand. These vendors and their products include Microsoft Dynamics CRM, Oracle Siebel and Oracle CRM On Demand, salesforce.com, and SAP CRM. CRM suite vendors focused on the midmarket, such as CDC Pivotal, Maximizer, Sage SalesLogix, and SugarCRM, also have new mobile solution offerings. RightNow Technologies and Sword Ciboodle concentrate on providing solutions for helping companies offer mobile access to consumers for service and support interactions.
- **Specialized business process and industry solutions.** Specialist vendors are also moving into mobile CRM. Pegasystems is rushing to develop mobile capabilities to incorporate into its business process management solution offerings. Quofore has strong mobility solutions and specializes in supporting the unique needs of sales and merchandising organizations in the consumer packaged goods industry. Life sciences CRM specialists like Veeva Systems, Cegedim Mobile Intelligence, StayinFront, and Update Software AG recently announced new offerings to support tablets — specifically iPads. Independent software vendors offer mobile solutions to extend the offerings of CRM enterprise suites, like CWR Mobility's solutions for Microsoft Dynamics CRM.
- **The type of application.** Applications can be native (thick client); web or hybrid (native plus web); or cross-platform (mobile middleware or rich Internet client applications). Today, developers build specialized thick-client applications that are downloaded onto PCs or mobile devices. But the rise of HTML5 will solidify the browser as a viable local host for applications. With HTML5, the browser becomes a more capable thin client accessing services on a centralized, cloud-based host.
- **The device type and form factor.** The range of devices and form factors is proliferating rapidly and includes laptops, phones, smartphones like the iPhone and BlackBerry, and tablets like the Apple iPad, BlackBerry PlayBook, HP TouchPad, Motorola Xoom, and Samsung Galaxy Tab. Each size and shape is more suitable or less suitable for specific use cases.
- **The device OS.** Apple's iOS has become very popular very quickly, but there are other OSes to consider, including Android, Bada, RIM, WebOS, and Windows Phone 7.
- **The browser.** Even the choice of browser requires a decision: Chrome, Firefox, Internet Explorer Mobile, Safari, or the BlackBerry Torch browser.
- **The mobile middleware platform.** Mobile middleware provides the tools, in one platform set, that allow an organization to develop and deploy multiple mobile applications that may run on multiple mobile device types. Examples include Antenna Software, MobileIron, RIM, SAP Sybase, Spring Wireless, and Syclo.

- **The telecommunications carrier.** Your mobile solution configuration must align with the capabilities of specific carriers and the related policies and contracts that your company has with respect to providers like AT&T, BT, T-Mobile, Verizon, and Vodafone.
- **Professional services providers.** Due to the complexity of developing and deploying mobile CRM solutions, major professional services organizations are ramping up their mobility skills. BearingPoint, Cognizant, Tata Consulting Services (TCS), and Wipro are all active in the mobile customer management solutions arena. Model Metrics, a long-time salesforce.com consulting partner, has built innovative mobile solutions for the life sciences industry on the Salesforce platform.

### SUCCESSFUL ADOPTERS USE FIVE STRATEGIES TO REDUCE THEIR RISKS

The flood of new devices and mobile offerings makes navigating the mobile technology landscape challenging. To understand how successful companies capitalize on the benefits that mobile CRM solutions offer and manage the new risks posed, we spoke with 25 business process and CRM professionals at buyer companies, professional services providers, and software vendors. Business process pros who support customer-facing processes should adopt five strategies to capitalize on mobile CRM: 1) understand users' roles and needs; 2) determine the objectives; 3) define the mobile strategy; 4) choose the right technology; and 5) follow the right implementation approach (see Figure 1).

**Figure 1** Mobile CRM Best Practices



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Source: Forrester Research, Inc.

## BEST PRACTICE NO. 1: UNDERSTAND USERS' ROLES AND NEEDS

A successful approach for mobile CRM is rooted in defining and understanding the user groups that you need to support with mobile solutions.<sup>10</sup> Understand the ways employees conduct business, the ways they interact with each other and would like to interact with each other, and how your company delivers products and services to its customers:

- **Focus first on task workers.** Task workers use mobile devices to do their jobs on a daily basis; they are often found in specific vertical markets, including chemicals and petroleum, manufacturing, retail, and healthcare. Examples include a delivery driver assigned to a daily route to replenish stock at stores or deliver packages, and an employee checking in rental cars when they are returned to the airport. The standardized work activities of many task worker groups often makes it possible to target a single mobile platform with a native application to address their needs.

“Our primary users are regional sales managers who work daily with independent reps. They need help being more productive in carrying out the daily tasks of call planning, sales presentations, follow-up task assignments, sales activity tracking, and sales forecasting. Mobile applications allow them to complete administrative tasks during open times throughout the day and not have to wait to return home to do their paperwork.” (VP of sales, industrial equipment manufacturer)

- **Look for ways to support information workers.** Information workers spend time analyzing information, making complex decisions based on their best judgment, and interacting with people including other employees, customers, and suppliers. Information workers often bring their personal mobile devices into the workplace and generally pay for these devices on their own, even if their company reimburses them. These individuals expect the company to support their mobility requirements, including access to whatever information they need to do their job. As a result, supporting information workers generally requires a cross-platform application development capability.

“I live in my smartphone. The key performance indicator dashboards I have there enable me to track the status of critical activities and intervene quickly if I see negative trends compared with the plan.” (VP of sales, information services provider)

- **Consider the needs of mobile wannabes.** Mobile wannabes are nonmobile workers, often Millennials, who want to use their personal mobile devices for work-related activities. They are used to getting personal email and push notifications from social sites such as Facebook on their iPhones and BlackBerrys. While there may not be a clear-cut business justification for supporting these nonmobile workers, application development shops should not ignore them completely, because they are the fastest-growing segment among internal users of mobile technologies.<sup>11</sup>

“More and more of our employees are bringing their personal devices to work and are pushing us to let them use these devices to do their work tasks.” (VP of sales, information services provider)

- **Understand the needs of connected consumers.** Forrester’s Mobile Technographics® Profile is a useful guide for understanding how your customers use their mobile phones.<sup>12</sup> The profile describes six profiles: Inactives, Talkers, Communicators, Connectors, Entertainers, and SuperConnecteds. Two of these profiles — SuperConnecteds and Communicators — are the best fit for mobile applications. SuperConnecteds use their phones to get information, research products, check stock quotes, check financial accounts, and generally stay in constant contact. While Communicators do not regularly use data services, they are familiar with SMS, MMS, or IM and can be reached via a text-based interface and push messaging.

“Our clients are asking us to build applications so that customers can check their bills using their mobile devices.” (Head of technology, CRM software solution vendor)

## Pitfalls To Avoid When Understanding Users' Roles And Needs

If you lead a mobile CRM initiative in your organization, be wary of pitfalls like:

- **Ignoring the corporate culture.** Although mobile CRM may seem like a topic that is primarily technical in nature, how employees communicate and collaborate with each other and external influencers — on topics such as where and to whom service will be provided — directly affects the way organizations manage and conduct their business. Mobile solutions should be aligned with existing communication patterns within the organization and help make those communications more efficient and effective.
- **Failing to support user adoption beyond the initial rollout.** A mobile CRM rollout does not stop the day the application is introduced to users. Best practices to drive user adoption include senior management communicating about the importance of the solution via a monthly newsletter; intervening one on one with those resistant to change; actively soliciting feedback from users; and making needed changes quickly. Examples of changes include eliminating unused fields, simplifying cluttered page layouts, and clarifying terminology that does not make sense to users. Make sure you have enough resources with the requisite skills to support the mobile CRM solution.

## BEST PRACTICE NO. 2: DETERMINE BUSINESS OBJECTIVES

A solid approach to mobile CRM starts with recognizing where an organization can realize immediate benefits on the business side. What sorts of goals result in effective mobile applications? In general, look for situations where you can integrate a mobile application into the normal execution of your day-to-day business processes.<sup>13</sup> In this way, mobile applications function as an alternative view that supplements existing interaction channels:

- **Understand the opportunity to improve CRM and drive adoption.** For example, will enabling workers to update the CRM system and tasks in real time throughout the day when they're in the field — rather than doing it once they get back to their desks at the end of the day — make them more productive?

“Our representatives have to report the outcomes of each sales call and contribute to updating our sales forecasts. By giving them mobile devices, they can now do this frequently during the day in between calls; therefore, they're more productive. And the data is more accurate; they don't wait until the end of the day, when their memories might not be as fresh, to do it. We are seeing much higher adoption of our CRM solution since we added mobile access.” (VP of sales, financial services company)

“Reps can capture doctor signatures and maintain this information for regulatory compliance purposes. It is imperative to log this information on the spot; a mobile device makes that easy to do.” (VP of commercial operations, pharmaceutical company)

- **Define the tangible business benefits mobile CRM solutions can deliver.** How will a mobile solution contribute to improved business performance? Are you looking to improve the productivity of frontline employees, streamline business processes, and/or improve customer satisfaction through more responsive customer service?

“Salespeople are very expensive. We needed to improve their productivity in the field. Our reps report that they save 6 hours a week on administrative tasks since we introduced our mobile CRM solution.” (VP of sales, industrial equipment company)

“The faster we follow up on client inquiries with appropriate information and quotations, the higher our close rate is. It went from 30% to 39%.” (VP of sales, industrial equipment company)

“The doctors we call on only give us a very short time to convey product information. A video clip shown on a tablet is very compelling and time-efficient. It makes the most of the short time we have with them.” (VP of commercial operations, pharmaceutical company)

“The impact of mobile CRM has been very important — it’s a make-or-break component of CRM for sales. Having access to and visibility into information on a customer in the field is huge.” (Vice president of business solutions, dental supplies manufacturer)

- **Define the precise use cases that you need to support.** You need to not only define the general user types that you want to support through mobile CRM solutions, but also drill deep to understand the exact job activities these users perform and how having a mobile device can help.

“Merchandisers now have access to all promotional materials and price lists.” (President, CRM solutions vendor)

“Our field service engineers receive their next-visit instructions via messages sent to their smartphones. Location presence capabilities help them find the customer location quickly and plan their routes better.” (VP of operations, telecommunications provider)

“Our reps use tablets to provide quick training tutorials for doctors on medical procedures and the correct use of our product.” (Mobile CRM solution project leader, pharmaceutical products company)

“Route drivers take pictures of competitors’ displays and relay data about the amount of shelf space we have in each store location.” (President, CRM solution vendor)

“Quotations are routed to me for fast approval. We handle expense approvals the same way.” (CEO, information services provider)

“I check my sales pipeline dashboard throughout the day to keep track of pending deals.”  
(Director, financial services company)

“Call reports and activity updates are automatically transferred into our CRM system. The representative makes a few simple clicks through his smartphone app after a customer visit. Updates go straight to the database.” (VP of sales, industrial equipment company)

“We are looking at integration between our billing system and CRM. Reps will be able to see open invoices, track orders on inventory, etc. This will give the accounts receivable department some relief, and order history will be retrievable in the field. We are looking at adding signature capture later this year.” (CEO, information services provider)

- **Understand the data and information that mobile workers need.** To provide mobile solutions that make workers more productive, you need to determine the precise set of information they need to perform daily tasks and the key information they need to collect on a daily basis.

“I need to know if there have been any service incidents and what the status of the customer order is before I visit the customer location.” (VP of sales, financial services company)

“Our people need to have up-to-date information about the contacts at an account and the activity record of previous visits.” (VP of sales, financial services company)

“My people need to have a limited but important set of information at their fingertips: contacts, opportunities, their calendar, the product catalog, and the KPI dashboard.” (VP of sales, industrial equipment company)

“Our reps record the full details of discussions with doctors on mobile devices — they need to have a full history of what happened previously for future meetings.” (Mobile CRM solutions project leader, pharmaceutical company)

- **Understand the device types and form factors that best suit people’s day-to-day tasks.**

Laptops, with their rich offline capabilities, may still be the best form factor for these tasks at the moment. However, newer device types like phones, smartphones, and tablets may soon become more useful than laptops.

“Field technicians need ruggedized laptops to perform their tasks. The amount of data they need to be available is very large and often there is no connectivity available in locations where they are working.” (Head of technology, mobile solutions vendor)

“Mobile phones work best for us. Email connectivity is all we need; everyone in Asia seems to communicate primarily through SMS.” (Practice leader, systems integrator)

“Smartphones with native applications and a lot of data storage on the device were a real step forward for us. We have instant access to all our CRM-related data. Field reps can synchronize easily wherever they have a phone signal.” (VP of sales, industrial equipment company)

“Tablets are the right form factor for showing our product demonstrations and other sales literature to prospects during a sales call.” (Mobile CRM solutions project leader, pharmaceutical company)

### Pitfalls To Avoid When Setting And Defining Objectives

When thinking through the key business objectives you need your mobile CRM strategies and solutions to support, don't make these mistakes:

- **Undervaluing the need for offline capabilities.** Offline CRM capabilities are still an important requirement in many user scenarios. What is the impact of offline applications not being available? In some use cases, such as field engineers working inside office buildings or factories or mobile workers covering remote geographies, connectivity may be poor or nonexistent. Many medical facilities prohibit online access. And employees may not use mobile CRM applications if they have to wait for web screens to refresh or need instant access to their full data set.
- **Not taking advantage of key mobile device capabilities.** Mobile devices come with native and unique capabilities, such as cameras, location presence, mapping, and alerting, that can deliver value to users above and beyond the functional application. Make sure to think about how these device capabilities can make the mobile workers' tasks more productive.
- **Making mobile tasks and data usage too complex.** Previous generations of mobile CRM solutions assumed that users would perform the same tasks and need the same functionality on the road as they do in the office. This has proven not to be true. Early adopters of mobile solutions learned that they get better adoption and business results by defining the few, but critical, information needs and data requirements to support specific user populations — and limiting the functionality to meet these priorities.

### BEST PRACTICE NO. 3: DEFINE THE MOBILE CRM STRATEGY

The strategy to support customer-facing mobile workers cannot be developed in isolation from the company's overall approach to enterprise mobility. In fact, mobile CRM initiatives often provide the impetus that drives many companies to first seriously consider the need to define an enterprise mobility strategy. Pin down the following key components to define a sound mobile CRM plan:<sup>14</sup>

- **Understand the mobile architecture framework.** To guide your IT team as the company adopts mobile CRM technologies, you need a set of architectural guidelines and a definition of ground rules to help make major decisions. For example: When should native or browser-based applications be used? What are the security guidelines?

- **Delineate the mobile technology infrastructure.** A mobile infrastructure consists of all the systems, devices, and tools required to deliver, secure, support, and manage mobile CRM applications.
- **Characterize the mobile user experience framework.** New mobile platforms like iPhone and Android have redefined how mobile apps interact with users. Enterprises can learn from the consumer apps by establishing a framework of roles and guidelines to create intuitive, high-performing, and reliable mobile CRM apps.
- **Define the mobile device type and device management strategy.** An explosion of innovation from mobile device makers has resulted in a wide range of devices to consider, including Android phones and tablets, Apple iPhones and iPads, BlackBerry handhelds, Windows Phone 7, and other tablets. You need to define a mobile device strategy that provides for a managed, secure, and diverse set of mobile devices and OSes.
- **Establish the mobile CRM application management strategy.** You also need to put the tools and processes in place to manage mobile CRM applications from their inception to the end of their life cycle. Consider remote over-the-air application provisioning, updating, and configuration tools to meet this need. Your company will need a way to monitor the usage, performance, security policies, and configurations of the mobile CRM apps.
- **Implement a mobile security framework.** Your company must define the right policies and processes and select the right enterprise-class mobile security management tools to enforce enterprise security policies. The keystone is device authentication and data encryption tools for the business data transferred between back-end systems and devices.
- **Align CRM with enterprise mobile governance policies.** Because the mobile technology space is developing so rapidly, many companies are challenged to put governance structures for mobility in place at the enterprise level. Accomplish this by establishing a mobility center of excellence responsible for setting strategy and policies. The mobile CRM approach must be aligned with overall company mobility management practices.

### Pitfalls To Avoid When Defining The Mobile CRM Strategy

Don't overlook the other considerations in a mobile CRM strategy, such as:

- **Security.** The architecture of the platform and mobile apps should be natively secure. Enterprise business leaders have been quick to adopt mobile devices within their organizations, often leaving security professionals in the dark. When this happens, it may expose the organization to costly security breaches and network attacks. Given the recent proliferation of tablets and the dramatic rise of mobile application development, security must get ahead of the curve and play a more active role in planning the firm's mobile strategy.<sup>15</sup>

- **App store provisioning.** Don't automatically default to public app store provisioning. This may be useful, but it's not necessary. Private provisioning is possible via enterprise app store solutions, like those from Apperian and MobileIron.
- **Mobile CRM application road map.** Showing quick wins is essential for creating a business case for mobile CRM. Define how mobile solutions can help employees work more productively in the future, going beyond your initial use case definitions. To increase the ROI of mobile CRM apps, develop a road map that considers leveraging other technology platforms, such as collaboration, social networking, and unified communications platforms.

#### BEST PRACTICE NO. 4: CHOOSE THE RIGHT TECHNOLOGY

Deciding on the specific technology configuration to support mobile customer-facing workers can be complex. Some key success criteria for evaluating mobile CRM solutions:<sup>16</sup>

- **Spotlight the user experience.** Will browser-based mobile access adequately support the use cases you have in mind? Or will businesspeople need the familiarity and intuitiveness of a native smart client that is specific to their mobile device and which leverages its design standards?
- **Understand speed and performance requirements.** Do you require the speed and performance of a native smart client? Or is the use of mobile CRM accessed via a web browser, which requires time for screens to refresh but is easier to develop and deploy, adequate for businesspeople's needs?
- **Define offline access needs.** Do businesspeople need to access their CRM information when out of the office — such as in an office building or parking garage, on an airplane, or where wireless access is prohibited?
- **Determine hybrid access needs.** Do users need to go online when retrieving data that might not be defined in their profile, as when they're covering for a colleague in another territory?
- **Understand the need for background synchronization.** Is there a requirement for the application to keep the mobile device up to date by synchronizing data between the mobile device and the server in the background?
- **Determine multidevice access requirements.** Do businesspeople need to simultaneously keep all of their information on their phone and on a tablet, such as being able to capture call activity on their BlackBerry and quickly find data on their iPad?
- **Understand need for integration with native applications.** Do businesspeople need to access the CRM application from within the native email, calendar, contacts, phone, and tasks capabilities of the mobile device for the manufacturers that allow it?

- **Consider ease of installation.** Do people need an easy means to download mobile CRM applications from established device manufacturer marketplaces like the iTunes App Store, BlackBerry App World, or Windows Marketplace for Mobile — or from the company's own server?
- **Determine connection security requirements.** Does the mobile CRM solution have the ability to encrypt data both when it's being transferred to the mobile and when it's stored in the local device database?
- **Agree on the need for extensibility.** How important will it be to add custom functionality, such as barcode scanning, signature capture, credit card processing, and mobile printing?
- **Understand the cost implications.** Consider five costs: 1) the license cost of the application to be deployed on devices; 2) the cost of deploying the application to devices depending on the instance of the application; 3) the cost of mobile devices depending on the user base; 4) the cost of maintaining the device, the software application, and third-party service providers in the case of cloud-based platforms; and 5) the cost of training the users.

### Pitfalls To Avoid When Choosing Technology

Be alert to the technology pitfalls that can trip you up:

- **No multiplatform support.** Will it be important to configure the CRM mobile applications once and push them out to any type of mobile device on any platform?
- **No support for dynamic application reconfiguration.** Will you need to make and publish changes to things like forms, views, and fields and have every mobile device update itself during the next synchronization without having to redeploy the mobile application?
- **No multilanguage or multicurrency support.** Does your company need to run the application in various languages and currencies from a single global deployment?
- **No support for employee-owned devices.** Does your company want to leverage the use of employee-owned devices, regardless of platform, rather than buying corporate devices for every employee and requiring employees to carry multiple phones?
- **No real-time data exchange.** Do you need to access all CRM data and web services without using staging or synchronization databases and maintain all security, workflows, and plug-ins?
- **Limited scalability.** Does the solution scale across all business units or will you need to build or customize something additional for each business unit(s)?

- **No integration with the current CRM solution.** Will your solution approach support the required integration with your existing CRM solution? Will businesspeople recognize the mobile solution as being consistent with the functionality of their current CRM solution?

### BEST PRACTICE NO. 5: FOLLOW THE CORRECT IMPLEMENTATION APPROACH

Mobile CRM considerations are no longer an afterthought in customer management initiatives. Instead, they often serve as the primary driver of and impetus for new CRM projects.

“The primary purpose of our CRM project was to enable our salespeople to be more productive during the day while they are in the field. This can only be accomplished by using mobile devices and mobile-accessed CRM solutions.” (Vice president of business solutions, dental supplies manufacturer)

Whether you implement and administer your new mobile CRM solution yourself or rely on vendors or third-party professional services partners, successful implementation and integration requires that you follow sound practices. Follow the same best implementation practices as for traditional CRM technology deployments:<sup>17</sup>

- **Define your objectives.** Before beginning the rollout, take a step back and reconfirm the critical business objectives that the mobile CRM solution will support.

“We always ask our clients: What do the executive team and your managers hope to get out of the solution? What are the goals of your end users? How do the corporate goals align with the business unit goals? Are there predefined metrics to track attainment of goals? How closely do the processes and applications map to the agreed-upon goals?” (CRM practice leader, professional services organization)

- **Build a team.** Successful mobile CRM projects require combining skills from various roles into a diverse cross-functional team. Focus on four roles in particular: 1) an executive sponsor to rally support and resources; 2) a steering committee that includes a representative from each of the user groups, such as end users, managers, executives, and IT; 3) a mobile CRM solution administrator with strong knowledge of your business processes; and 4) a mobile CRM vendor solution developer and/or professional services consultant.

“You have to build a project team to ensure support and representation from each of the business units that will be affected by the implementation.” (CRM practice leader, professional services organization)

- **Define the timeline.** All technology projects need a schedule to guide the implementation process; mobile CRM projects are no different. Implementing CRM solutions has become much easier and quicker due to the increased adoption of software-as-a-service (SaaS) — so-called “cloud” solutions. These have also made it easier to deploy mobile CRM solutions.

“It took us six months to roll out Salesforce to our reps, including time for the pilot. It only took another month to roll out the mobility capability.” (VP of sales, industrial equipment manufacturer)

- **Define the scope and prioritize initiatives.** A mobile CRM initiative, like a traditional CRM project, has several major tasks that need to be completed during the planning phase.

“For our mobile CRM initiative, we first conducted business process reviews with key stakeholders who could speak for the business organization to define the important business processes and activities the mobile solution should support. Then we interviewed key stakeholders to define the key requirements the solution should fulfill, prioritized these needs, and grouped them into phases. Finally, we modeled the mobile CRM vendor solutions to the business requirements.” (VP commercial operations, pharmaceutical company)

- **Configure the mobile solution for user relevance.** The next step involves configuring the mobile CRM solution to meet the specific needs of the employees in your organization.

“You have to map out current and desired processes; define the impact of business processes on the design of solution fields, records, and layouts; and define a list of standard and custom fields per record that should be in the solution, including field name, field type, and field values.” (CRM practice leader, professional services organization)

- **Launch the pilot.** You must involve people early in your mobile CRM project to understand their needs and build support for the solution. The best approach is to conduct a pilot of the mobile CRM solution with a limited set of employees to test and refine the solution.

“We recommend to our clients that they should never do a ‘big bang’ rollout of mobile CRM solutions. Get the vendors to give you demos. Get the devices in the hands of users early for them to get familiar with the capabilities. Set up a formal pilot program, set criteria for evaluating the pilot, and develop lessons for the rollout to the broader user population.” (President, independent mobile CRM solutions software vendor)

## Implementation Pitfalls To Avoid

Pitfalls that can sink your mobile CRM program include:

- **A lack of executive sponsorship.** Employees pay close attention to executive behavior, so it is important for senior leaders to be visible in CRM initiatives. We talked with one global sales manager who updates sales call visit notes for his reps using his smartphone while driving between calls. His actions demonstrate the importance and value of using mobile CRM devices.

- **Underestimating the human challenges.** Even though employees in many organizations now clamor for mobile devices, changing business processes require individuals to adapt to new ways of working. In our experience, technical challenges represent only 20% of the effort required for a CRM implementation. Addressing people issues will consume the remaining 80% of management's attention.
- **Importing dirty data.** A critical implementation step involves defining the process for migrating appropriate data to the CRM solution. You must identify where the data comes from, what format it will be in, and how clean it will be. After defining what data you will migrate, you must next clean it. Put a procedure for keeping data clean and up to date in place. CRM solution providers maintain lists of resources approved for data migration and cleansing.<sup>18</sup>
- **The lack of a sound training plan.** Training employees on how to effectively leverage a mobile CRM solution as a business tool is one of the most important steps during implementation. To help drive user adoption, you need a plan to ensure that the users understand what is expected of them, how they will be measured, and how to use the solution to accomplish those goals. CRM solution vendors typically offer instructor-led training, custom training, or train-the-trainer courses to support frontline users, power users, administrators, and solution developers. You should also foster and support informal learning approaches.<sup>19</sup>

## FORRESTER'S MOBILE CRM NEXT PRACTICES

While our research uncovered a number of mobile solutions best practices, here are some next practices that business process professionals should focus on once they've mastered the basics:<sup>20</sup>

- **For smartphone use cases, take a full-web approach.** Web technologies are resetting the mobile landscape, at least in the smartphone segment of the market. If you can scope your development efforts to the half-dozen mobile operating systems that will dominate this segment over the next five years, then full web development offers a cost-effective, standards-based way to create mobile applications. And with the improved capabilities that HTML5 offers just over the horizon, expect current challenges such as occasional problems with connectivity and access to on-device features to become less of an obstacle for all web apps.
- **Use native apps to serve niche requirements and ubiquitous deployment.** Don't expect a short-term winner in the device war. Entrenched competitors can't afford to walk away from the smartphone market. Free development tools and aggressive innovation will make it tempting to develop native apps, but you should only do so when there is a clear case for it, as with performance-intensive or standalone apps. Deployment in a vendor's application store can be important for some business cases, but instead of building a completely native app, consider a hybrid app with a native bootstrap routine that redirects to web content optimized for mobile devices.

- **Update your mobile strategy frequently.** There's still so much that's fluid in this space that you should not expect a single development approach to meet the needs of all your business stakeholders at this point. Expect to utilize multiple development approaches for the next 24 months, but look for opportunities to consolidate your techniques as the market begins to stabilize.

## IDENTIFY YOUR CHALLENGES

Where should you start to implement a mobile CRM for your organization? Use our self-diagnostic tool to assess your current capabilities and opportunities for improvement (see Figure 2). Scores will be calculated automatically for online readers. All scores are anonymous.

**Figure 2** Self-Diagnostic Tool For Mobile CRM Best Practices

### No. 1: Understand the user group

| Best practices                                                                                                                                                                  | Yes                      | No                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Have you defined the key task-worker groups that you need to support with mobile devices?                                                                                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered the needs of information workers, such as managers and executives, who will use mobile devices for information access and approval processing?              | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you identified the needs of mobile wannabes who want to use their personal mobile devices for work-related activities?                                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered the needs that your customers may have for interacting with your company through mobile channels?                                                           | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you considered the working practices and corporate culture of the users who work outside of the office and how this may affect their need for, and use of, mobile devices? | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Total</b>                                                                                                                                                                    | <input type="checkbox"/> | <input type="checkbox"/> |

### No. 2: Determine the objectives

| Best practices                                                                                         | Yes                      | No                       |
|--------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|
| Do you understand how the introduction of mobile devices and applications can improve CRM adoption?    | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you defined the tangible business benefits that mobile CRM solutions can deliver?                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you defined the precise use cases that need to be supported?                                      | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you defined the data and information needs of your mobile workers?                                | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you settled on the device types and form factors that best suit users for their day-to-day tasks? | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you made sure not to undervalue the need for offline capability?                                  | <input type="checkbox"/> | <input type="checkbox"/> |
| Have you ensured that the mobile tasks and data usage that need to be supported are not too complex?   | <input type="checkbox"/> | <input type="checkbox"/> |
| <b>Total</b>                                                                                           | <input type="checkbox"/> | <input type="checkbox"/> |

**Figure 2** Self-Diagnostic Tool For Mobile CRM Best Practices (Cont.)

**No. 3: Define the mobile CRM strategy**

| <b>Best practices</b>                                                                  | <b>Yes</b> | <b>No</b> |
|----------------------------------------------------------------------------------------|------------|-----------|
| Have you defined, and do you understand, your company's mobile architecture framework? |            |           |
| Have you delineated a mobile technology infrastructure?                                |            |           |
| Have you defined a mobile user experience framework to guide application development?  |            |           |
| Do you have a mobile device type and device management strategy?                       |            |           |
| Do you have a mobile CRM application management strategy?                              |            |           |
| Have you established a mobile security framework?                                      |            |           |
| Have you aligned mobile CRM with enterprise mobility governance policies?              |            |           |
| Do you have a mobile CRM application road map to guide future development?             |            |           |
| <b>Total</b>                                                                           |            |           |

60644

Source: Forrester Research, Inc.

**Figure 2** Self-Diagnostic Tool For Mobile CRM Best Practices (Cont.)

| <b>No. 4: Choose the right technology</b>                                                      |            |           |
|------------------------------------------------------------------------------------------------|------------|-----------|
| <b>Best practices</b>                                                                          | <b>Yes</b> | <b>No</b> |
| Will browser-based mobile access adequately support the use cases you have in mind?            |            |           |
| Have you defined users' speed and performance requirements?                                    |            |           |
| Have you defined users' offline access needs?                                                  |            |           |
| Will user groups need hybrid (shared) access to CRM data?                                      |            |           |
| Have you defined the requirements for background synchronization?                              |            |           |
| Do users have multidevice access requirements?                                                 |            |           |
| Have you defined the need for integration with native applications?                            |            |           |
| Have you considered how easy or hard it will be to install and administer mobile applications? |            |           |
| Have you determined connection security requirements?                                          |            |           |
| Is your mobile CRM application sufficiently extensible to potential future requirements?       |            |           |
| Have you defined the cost implications of your mobile CRM solution?                            |            |           |
| Do you need multiplatform support?                                                             |            |           |
| Does your mobile CRM solution support dynamic application reconfiguration?                     |            |           |
| Do you need multilingual, multicurrency support?                                               |            |           |
| Will you need to support employee-owned devices?                                               |            |           |
| Do you require real-time data exchange to meet the needs of end users?                         |            |           |
| Do you need a mobile CRM solution that is highly scalable?                                     |            |           |
| Will your mobile solutions integrate well with the your current CRM solutions?                 |            |           |
| <b>Total</b>                                                                                   |            |           |

60644

Source: Forrester Research, Inc.

**Figure 2** Self-Diagnostic Tool For Mobile CRM Best Practices (Cont.)**No. 5: Follow the correct implementation approach**

| <b>Best practices</b>                                                                                                             | <b>Yes</b> | <b>No</b> |
|-----------------------------------------------------------------------------------------------------------------------------------|------------|-----------|
| Have you clearly defined your mobile CRM objectives?                                                                              |            |           |
| Have you assembled a team that includes the right stakeholders and brings the requisite skills to the project?                    |            |           |
| Have you defined a clear timeline for the mobile CRM project?                                                                     |            |           |
| Have you defined the scope of the mobile CRM initiative and prioritized specific elements to tackle first?                        |            |           |
| Have you configured the mobile solution so that it is highly relevant to the user task requirements?                              |            |           |
| Will you test your solution through the use of a pilot project with a small group of users?                                       |            |           |
| Have you secured sufficient executive-level sponsorship for the mobile CRM strategy and solution rollout?                         |            |           |
| Have you defined a change management plan to address helping employees adjust to new ways of working supported by mobile devices? |            |           |
| Does your rollout plan have provisions to make sure you will not be importing dirty data into your CRM system?                    |            |           |
| Do you have a sound training plan for supporting users of mobile devices for CRM?                                                 |            |           |
| Do have plans in place to support user adoption beyond the initial rollout?                                                       |            |           |
| <b>Total</b>                                                                                                                      |            |           |

60644

Source: Forrester Research, Inc.

**SUPPLEMENTAL MATERIAL****Online Resource**

The online version of Figure 2 is an interactive self-diagnostic tool that helps clients assess how their current practices stack up against those of their peers.

**Companies Interviewed For This Document**

|                    |                  |
|--------------------|------------------|
| BearingPoint       | Microsoft        |
| CDC Software       | Miyachi Unitek   |
| Cognizant          | Model Metrics    |
| CWR Mobility       | Nestlé Nutrition |
| iCentra            | Oracle           |
| Maximizer Software | Pegasystems      |

|                        |                           |
|------------------------|---------------------------|
| Quofore                | SugarCRM                  |
| RightNow Technologies  | Sword Group               |
| Sage                   | Sybron Dental Specialties |
| salesforce.com         | Tata Consulting Services  |
| Santander Consumer USA | USA-Fact                  |
| SAP                    | Wipro IT Business         |
| StayinFront            |                           |

## ENDNOTES

- <sup>1</sup> Corporate focus on enterprise mobility initiatives is evident from the high priority many firms place on supporting a range of mobile device and application initiatives in 2010. Most enterprises are not standardizing on one type of mobile device or operating system. In fact, more than 50% of surveyed enterprises support more than one mobile device operating system, and 25% of firms support three or more mobile device operating systems. For insight into other factors driving the fragmented mobile device and application environment in corporations, see the October 28, 2010, “[Managing Mobile Complexity](#)” report.
- <sup>2</sup> Enterprises of all sizes must support a multitude of mobile devices and applications that run over a wide range of mobile operating systems, as well as update devices and applications every few months. In addition, empowered employees are circumventing the IT organization by purchasing mobile devices and downloading applications on their own. Vendors are developing mobile cloud services to meet emerging demand from IT organizations for help in managing this Wild West-type mobile device and application environment. This report identifies factors creating demand for mobile cloud services, defines the characteristics of those services, and discusses how corporate mobile cloud service adoption will evolve over the next few years. See the May 2, 2011, “[Vendors Seize Emerging Mobile Cloud Service Opportunities](#)” report.
- <sup>3</sup> Source: Jim Dickie, “Mobile CRM: The Quiet Explosion,” *Destination CRM*, June 2011.
- <sup>4</sup> As reported by BearingPoint during an interview in July 2011.
- <sup>5</sup> Developing mobile applications used to be an arcane activity pursued by highly specialized developers, but no more. The surge in popularity of Android devices, BlackBerrys, and iPhones has application development professionals gearing up to incorporate mobile development into mainstream development processes. The first step in taking mobile development mainstream is defining your strategy. Learn from your peers in consumer product strategy by applying Forrester’s POST method to your mobile development efforts. See the August 24, 2010, “[Define Your Mobile Development Strategy](#)” report.
- <sup>6</sup> Forrester believes that the mobile/social/local “combo” will drive lots of innovation and growing consumer adoption but not real revenues — yet. The focus for companies willing to tap into the growing mobile opportunities should be on moving from experimentation to the creation of a mobile business case and

strategy, while recognizing that the challenges associated with fragmentation will persist. See the January 24, 2011, ["2011 Mobile Trends"](#) report.

- <sup>7</sup> Enterprises of all sizes must support a multitude of mobile devices and applications that run over a wide range of mobile operating systems, as well as update devices and applications every few months. In addition, empowered employees are circumventing the IT organization by purchasing mobile devices and downloading applications on their own. Vendors are developing mobile cloud services to meet emerging demand from IT organizations for help in managing this Wild West-type mobile device and application environment. This report identifies factors creating demand for mobile cloud services, defines the characteristics of those services, and discusses how corporate mobile cloud service adoption will evolve over the next few years. See the May 2, 2011, ["Vendors Seize Emerging Mobile Cloud Service Opportunities"](#) report.
- <sup>8</sup> Forrester's survey of more than 5,000 information workers in five countries reveals that half of the information workforce works online from home, and one in five does on the go. They also live online, using the Internet for personal purposes at work (especially your senior staff). But surprise! Employees give that time back by working online the same number of hours at home, where Facebook and YouTube and email and web meetings blend into a happy work/life balance. See the March 17, 2011, ["The Internet Crushes The Work/Life Boundary"](#) report.
- <sup>9</sup> This opinion is shared by the professional services organizations we spoke with who implement mobile CRM solutions.
- <sup>10</sup> For a more complete discussion of the different types of mobile user groups, see the August 24, 2010, ["Define Your Mobile Development Strategy"](#) report.
- <sup>11</sup> Consumerization — employees using devices, applications, and web services without permission — is a threat to the status quo and a risk to the security of the firm. But it's also a key driver of employee-led "groundswell" innovation. Just how much so becomes clear in Forrester's study of more than 5,000 information workers. Highly empowered and resourceful operatives (HEROes) — the 17% of information workers in North America and Europe that feel empowered to solve problems and act resourcefully with technology to do so — are the innovators, advocates, and leaders in your organization. See the May 23, 2011, ["How Consumerization Drives Innovation"](#) report.
- <sup>12</sup> For details on the six profiles for customers and their frequencies, see the April 9, 2009, ["The POST Method: A Systematic Approach To Mobile Strategy"](#) report.
- <sup>13</sup> In a previous report, Forrester introduced a new model we call Process-Views-Services (PVS). PVS defines the structure of an application and also serves as a conceptual model for the applications within an overall solution portfolio. See the February 12, 2008, ["Process-Views-Services: A Better Design Paradigm For Applications"](#) report.
- <sup>14</sup> Source: Dr. Ahmed El Adl and Sam Lakkundi, "How To Turn Mobility Momentum Into Real Business Value," *SAP Insider*, January/February/March 2011 ([http://viewer.media.bitpipe.com/1070398394\\_846/1297269478\\_803/RBV.pdf](http://viewer.media.bitpipe.com/1070398394_846/1297269478_803/RBV.pdf)).

- <sup>15</sup> Given the recent proliferation of tablets and the dramatic rise of mobile application development, security must get ahead of the curve and play a more active role in planning the firm's mobile strategy. Assessing mobile computing risks, crafting a mobile security policy, auditing the mobile application architecture, and selecting mobile security management technologies should become commonplace practices before the organization runs full steam ahead with its mobile strategy. See the June 22, 2011, "[Tablets Pave Way For Mobile Development: Security Pros Must Get Ahead Of App Dev Wave](#)" report.
- <sup>16</sup> Source: CWR Mobility (<http://www.cwrmobility.com/mobile-crm-downloads>).
- <sup>17</sup> Smart companies use five best practice strategies to succeed with CRM SaaS solutions: build a solid business case; negotiate a sound contract; use a proven implementation approach; establish strong data security procedures; and create robust governance and support structures. See the May 7, 2008, "[Best Practices: The Smart Way To Implement CRM SaaS Solutions](#)" report.
- <sup>18</sup> Forrester has witnessed a significant increase in organizations' adoption and interest in embedding data quality best practices, methodologies, and technologies into their enterprise data management strategy and architecture. When assessing what triggered this shift in focus to data quality, consider that many business process professionals within large enterprises experience underperforming CRM, ERP, data warehousing (DW), and business intelligence (BI) initiatives. See the October 29, 2010, "[The Forrester Wave™: Enterprise Data Quality Platforms, Q4 2010](#)" report.
- <sup>19</sup> The fast pace of the work environment requires us to step outside of traditional learning approaches and harness the value that informal learning, with its immediate access to knowledge and information, brings. Some companies have begun with small pilot programs that include discussion groups about courses, user-generated content employing multimedia, and tagged and searchable content in knowledge repositories. Business process pros must help facilitate discussions around the best use of informal learning when deploying and continuously improving business processes and listening to the voice of the customer through social media. See the July 14, 2011, "[Informal Learning Garner Acceptance As A Legitimate Learning Approach](#)" report.
- <sup>20</sup> Even though it's not the perfect time to set a mobile development strategy, you can make it work as long as you choose the right development options to fit the users you need to support. Forrester's POST methodology is a quick, useful guide that will help you quickly make decisions about the best of the six mobile development techniques and the numerous vendors that provide solutions to implement them. See the August 24, 2010, "[Define Your Mobile Development Strategy](#)" report.

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Making Leaders Successful Every Day

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