



# Mandatory mobile: Taking CRM on the road



In today's mobile world, many employees need access to their tools and company information anytime, anywhere. Gone are the days of the salesperson sitting at his or her desk making 75 calls a day to hit a quota—unable to accomplish anything at all if they step away from the computer. Now, whether they're selling building materials, pharmaceuticals, or fresh produce, sales representatives need comprehensive, intuitive, connected tools that can be used on any device—on the road, in the office or at home.

Customer relationship management (CRM) systems have existed since the 1990s, evolving from the early days of contact management software, to nearly dying during the dot-com burst and reviving in the years that followed. In the early 2000s, the book "CRM at the Speed of Light" by Paul Greenberg, later coined the "bible of the CRM industry," brought to the forefront the concept of a CRM system that completely manages the business relationship. Many of Greenberg's ideas have come to fruition, and as cloud technology has developed, CRM has become an integrated part of the organization, its information, and its processes.

## Customers need more

The drive for a better CRM system is a result of customer demand. After the start of the social revolution, which was of course, spawned by the Internet and augmented by the widespread use of smartphones, companies began to want innovative technology that could do more than just prompt phone calls and track sales. Now that we have access to more information, to more people, through more channels, and are able to do more with mobile devices than ever, our customers are well informed.

They expect prompt, accurate information, when and how they want it. They want integration, connection, and more control. And if your company can't deliver, there's surely someone else—just a few taps and swipes away—who can.

On the flipside, organizations often expect a great deal of success from their field sales teams—even those teams that have not been provided the latest tools to give customers what they need, or keep up with the competition. The problem is if your salespeople are blindly making decisions and taking liberties to get the sale without having access to the right information, there can be serious damage done. Nothing makes a hot lead turn cold faster than misinformation or wasted time, good intentions not withstanding.

## CRM goes mobile

Naturally, since the customer has evolved, sales must evolve too. CRMs are integrating with mobile technology to give salespeople many of the same tools on the road as at the desk. Providing the ability to easily access useful information—buying history, contact information, shipping updates, etc.—on a mobile device to address customer needs has become critical. So are tools to:

- Connect all devices and applications.
- Collaborate with team members on the fly.
- Enter information such as orders and customer data, instantly.
- Receive leads from demand gen systems.
- Keep track of activities.

But, not all CRM systems are created equal.

## Avoiding the trap of the wrong CRM system

Buying a new tool based solely on features is never a good idea. Even for the most revered, top-rated product, if it doesn't fit the needs of your organization, or, if it is not properly implemented, the fact is, it will be hated, berated, and worse—avoided. According to Forrester, “The cost of poor adoption is twofold: underutilized investment and unmet business objectives.”<sup>1</sup> Therefore, since your sales are highly dependent on the quality and use of your CRM and how it integrates with the rest of your organization, choosing the right one is not a decision to make lightly.

## Things to remember when choosing a CRM system

Too much is too much. A CRM system with too many features is actually a bad thing. Salespeople don't want to be overwhelmed by their tools—they want easy access to usable tools and information that gets them closer to the sale faster. Watch out for features that sound great, but make you say, “I've never thought of that,” or that cause you to question their relevance. Chances are if you haven't thought of it, read about it, or gotten requests for it, it isn't going to be used by your team.

For example, Infor CRM is built for mobility—with a task-oriented user interface that enables users to perform key actions quickly. Mobile is a must, and it must be affordable. Even inside sales teams need to access information outside the office. Check available mobile features, integration capabilities with your systems and applications, and social networking services and systems. Compare features vs. pricing to ensure you are getting the most usable solution for your money.

Is it good for your company, or good for the customer? It should be good for both. A CRM system's purpose is to improve the work lives of your employees through simplification and automation, while improving the customer experience through better, faster service. “I believe the biggest challenge for the future of CRM systems is trying to make the system simple enough so that the sales force can use it, but at the same time comprehensive enough so that it can manage huge amounts of data,” said Steve Thompson, AgReliant Genetics, winner of Gartner and 1to1 Media's 2013 CRM Excellence Award for Sales Force Automation.

“One of the big trends I see for sales force effectiveness is the continued adoption of smartphone and tablet devices by our salespeople....now they have a wealth of third party apps that they can access that make their customer interactions that much better.”

With Infor CRM, users have a complete view of customer interactions across your entire organization so they can collaborate effectively and respond promptly to customer inquiries—easily and accurately.

Align your CRM strategy with company goals. Positive you've found the best solution? Will it pass the scrutiny of even your top salespeople? Great. But if you grow out of the solution in two years, you've made the wrong choice. This important project needs to be implemented like an ongoing journey, with a highly experienced IT leader at the helm, executive buy in, and alignment with company strategy. It's a good idea for all the groups that will be using the system to outline its near-term and long-term goals so that the most important of them can be addressed. Ideally, the solution you choose will be with your company for the long haul, scaling with your growth and expanding with your needs.

Rollout with users in mind. Again, consider this a journey that never ends rather than a project with one deadline. Your CRM capabilities should change as your customer needs change, and as technology advances. In addition, your employees will need training. Don't assume they will love it right away – people in general are resistant to change. “Avoid mistrust and the feeling of loss of control by getting others involved in the changes before they occur and asking them to offer input and feedback,” says Lisa Quast, in a recent Forbes article on implementing change.<sup>2</sup> And, make a big deal out of it! A little internal promotion with executive backing will help with employee buy in.

## Infor CRM is the mobile CRM for today and tomorrow

Infor CRM addresses all of your mobile CRM concerns. It has just the right features to give employees information at their fingertips with an easy-to-use interface. It's affordable, scalable, and has integration capabilities to grow with your organization.

Infor CRM is a state-of-the-art technology platform that is built for mobility. An award-winning CRM solution, Infor CRM provides a comprehensive view of customer interactions across your sales, marketing, customer service and support teams so they can collaborate quickly and respond intelligently to customer needs and sales opportunities. Infor CRM provides:

- **Flexibility.** Deploy in the cloud, on-premise, mobile, or hybrid. Integrates with backend applications, social networking services, and with marketing automation software like Salesfusion™.
- **Control.** Define and automate key business processes, sophisticated security and administration capabilities, and maintain control of your data.
- **Usability.** Easy-to-learn-and-use interface brings high user acceptance, low learning curves and rapid productivity.

- **Mobility.** All the capability your team wants, on any device, anywhere, anytime. Infor CRM brings useful information in customizable dashboards, embedded menus, dropdowns and one-click access to get what you need.
- **Marketing automation.** Connect with customers and act on opportunities. Capture and manage leads from almost anywhere. Infor CRM integrates with your marketing solutions and provides a one-stop view of all customer activities.
- **Reporting and analytics.** Enable actionable insights from your CRM information.

Infor CRM Mobile is the CRM system for the mobile world. Give your sales team what it needs to succeed, and improve the customer experience while meeting company goals—today, tomorrow and beyond.

Try Infor CRM today at [go.infor.com/crmtrial](http://go.infor.com/crmtrial)

Contact [Dick@SuccesswithCRM.CRM](mailto:Dick@SuccesswithCRM.CRM) from Success with CRM Consulting, Inc. 269-445-3001 for a no obligation conversation about using CRM to reach your business objectives.



<sup>1</sup> Forrester, "CRM Success Hinges On Effective Change Management," William Band, Claire Schooley. December 3, 2013

<sup>2</sup> Force.com "Overcome The 5 Main Reasons People Resist Change," Lisa Quast. November 26, 2012



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