



NATIONAL ASSOCIATION OF  
ELECTRICAL DISTRIBUTORS



# Executive Guide #10 Mobile Technology for the Distribution Sales Force

*Developed by the NAED Strategic Technology Committee*  
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## PURPOSE OF THIS DOCUMENT

NAED's Strategic Technology Committee created the ***Executive's Guide to Mobile Technology for the Distribution Sales Force*** to assist distributor executives in understanding the way technology is important for an electrical distributor's sales force, recommended technology for today's mobile sales force, sales force productivity tools, tips for implementing mobile technology, a technology and tool checklist for sales personnel, and recommended resources. Future Executive Guides will explore how mobile technology is changing marketing and information technology (IT), as well as mobile technology for purchasing, warehouse and delivery.

In 2012, NAED's Strategic Technology Committee published Executive Guides on strategically managing your company's online presence and e-commerce capability. They are available for download at [www.naed.org/strategictechnology](http://www.naed.org/strategictechnology).

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## INTRODUCTION

Mobile technology is the new normal, allowing us to work productively from any location and even on the move. According to the January 2014 Pew Research Internet Project Mobile Technology Fact Sheet, 42 percent of Americans own a tablet computer and 58 percent own a smartphone. As mobile device adoption rates continue their rise, understanding how to efficiently use smartphones and tablet computers is a key business skill. Here's what you can do to help your sales force stay relevant while reaping the rewards of a mobile world.

## WHY TECHNOLOGY IS IMPORTANT FOR AN ELECTRICAL DISTRIBUTOR'S SALES FORCE

Electrical distributors can significantly improve business results by going mobile. In addition to offering mobile websites, e-commerce and apps for customer use, the electrical distributor's sales force must augment customer relationships, knowledge and expertise with mobile technology. With the help of mobile technology, electrical distributors gain a competitive advantage over online players and improve the productivity of the sales force.

### Top 3 reasons to adopt sales technology...**NOW**

1. Meet customer expectations
2. Gain a competitive advantage over online players
3. Improve sales force productivity

### Technology can help electrical distributors meet customer expectations

Customers are adopting mobile technology in the workplace in ever increasing numbers. They expect the same experience on their smartphones and tablets at work as they receive as consumers. Respondents to an August 2014 NAED survey of IEC and NECA contractors revealed 89 percent use a smartphone for work, 58 percent use a tablet for work and 24 percent use mobile apps to find products, check stock and place orders. This represents a significant opportunity for electrical distributors to engage and serve customers on the customers' terms—*how, when and where they each want to be served*—by offering e-commerce websites and mobile apps optimized for both smartphones and tablet computers.

### Sales people + mobile technology = competitive advantage over online players

Distribution is a relationship business—*customers want to rely on a human being for answers and solutions to their specific problems*. Real time connectivity and social networking merge content, community and commerce, offering new ways for outside sales people to build relationships with

customers. While customers expect access to basic information without involving salespeople, self-service information cannot replace the expertise, knowledge and problems solving capabilities of sales personnel armed with real time information.

Relationships and technology tie companies together. Through collaboration, information sharing and routine processes, links will be forged that are difficult to break. While smartphones enable information sharing and order entry for Internet only businesses, their call center personnel will have a difficult time competing with local distributors providing access to information in real-time and seamless online transactions.

## GENERATION GAP

Sharing via chat, texting, social networking and online ordering are a way of life for those born after 1980 (*also known as Millennials or Gen Y*). Therefore, seasoned sales veterans risk being left behind by both customers and co-workers if they don't heartily embrace mobile technology and integrate it into their daily work life.

### Technology can help improve sales force productivity

Leveraging technology for marketing, basic product research, order entry and logistics gives the sales force more time for selling. Sales expense is often an electrical distributors' largest operating expense—8.4 percent of sales for the typical NAED distributor according to the 2014 PAR Report (2013 results). In addition, the 2011 NAED Education & Research Foundation study, *"Maximizing Sales: Techniques & Tools to Boost Selling Productivity,"* found on average, distributor sales people spent 33 percent of their time on non-selling activities such as order entry, checking stock, expediting deliveries and resolving disputes over price and delivery. Electrical distributors can reduce non-selling time significantly by implementing e-commerce and mobile technology.

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***Sales expense is most electrical distributors' largest operating expense.***

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## RECOMMENDED TECHNOLOGY FOR TODAY'S MOBILE SALES FORCE

Communication technology—*telephone, voice messages, email, instant messaging, text, online chat, audio and web conferencing, etc.*—is crucial for electrical distributor sales personnel. Unifying voice and email communications with mobile technology can transform the sales force by allowing immediate and direct access to all relevant company information without a call to an intermediary or a trip back to the office.

## Mobile office equipment

Whether company supplied or personally-owned (*otherwise known as **Bring Your Own Device***<sup>1</sup>), smartphones and/or tablet computers<sup>2</sup> should be standard issue for sales personnel. Their standard toolkit should include: blue-tooth devices (*mouse, keyboards and headsets*); thumb drives; smartcards; as well as power and presentation cables. Training should be provided on how to use the technology—*the selected mobile device(s), teleconferencing, web conferencing, digital presentation skills, social media, etc.*—along with competency demonstrations to ensure every sales person is capable of, and comfortable with, using these tools.

Besides mobile office equipment, an electrical distributor's sales force will also need anywhere connectivity, remote access to information and select sales productivity tools.

## GENERATION GAP

Research shows most Millennials value their smartphones more than their cars, want everything at their fingertips, prefer to use mobile apps and conduct pre-purchase investigations themselves before reaching out for help. Seasoned sales veterans, on the other hand, tend to lean more towards tablets and gather information by accessing mobile websites.

## A mobile office requires anywhere connectivity

A mobile sales force requires multiple options for anywhere network connectivity—*Wi-Fi, LAN, tethered cell phone and/or personal hot spot*. Secure access to their corporate network and applications, as well as corporate guidance on public Wi-Fi networks gives the mobile sales representative the ability to stay securely connected to customers, internal support team, web services and enterprise applications.

Electrical distributors also need to develop mobile device security policies<sup>3</sup> and deploy mobile device management (MDM) solutions to protect their data and devices from breaches. A secure MDM solution allows company IT administrators to manage mobile devices according to the company's policies: activate/deactivate the device; authorize, authenticate and apply appropriate security and configuration settings; update mobile device operating systems and software; monitor and otherwise manage mobile devices including removing company data from the device remotely.

## Remote information access is a must for the mobile office

Business can be conducted faster if real time information is at the sales force's fingertips. Ideally, any information accessible to the individual in the office<sup>4</sup>—*company intranet, company website, ERP system,*

<sup>1</sup> If BYOD is implemented, electrical distributors will need to develop policies regarding acceptable devices (*including platform—iOS, Android, Windows—and version*). The company's level of technical support should also be clearly defined.

<sup>2</sup> For more information on selecting tablet computers, please see the [2013 NAED Executive Guide 7: Selecting Tablet Computers](#).

<sup>3</sup> For more information on data security, please see the [2013 NAED Executive Guide 5: Mobile Device Security Policy](#).

<sup>4</sup> See Exhibit A, on page 10, for a listing of recommended tools and technology for sales personnel.

*customer dashboards, documentation, etc.*—should be available in their mobile office. Some electrical distributors provide remote access to company information via an internal company app; others provide access via a virtual private network (VPN) with or without a security token; while others store documentation “in the cloud.” The decision of where to store business critical information is primarily about costs, policies, processes and security. Information stored “in the cloud” requires an Internet connection; nevertheless, the cloud does allow online backup, online file storage and file syncing across devices, without the hassle of downloading a file attached to an email.

## Mobile sales force productivity tools

In addition to providing anywhere connectivity and remote access to information, electrical distributors must also provide the mobile sales force with an array of information support tools. Here are a few to consider<sup>5</sup>:



### Marketing materials & product information

ElectricSmarts SMART e-Cat and RepFiles NAED edition offer apps for accessing manufacturer marketing materials and product information that can easily be emailed to customers while the sales representative is on the sales call.



### Industry calculators

Available from various manufacturers.



### Customer relationship management (CRM)

Sales Force, Tour de Force, etc. help the sales force develop communications that are tailored to customer interests.



### Cloud-based collaboration software

Salesforce's Chatter, Microsoft's SharePoint, Yammer and Huddle offer the sales force ways to instantly broadcast product questions, promotions or information to their support staff or the entire company. They can also foster interdepartmental and inter-branch relationships.



### Cloud storage services

Microsoft Office 365, Dropbox, OneDrive for Business and Box are examples of cloud-based storage tools that offer ways to access, share and edit your documents and files anywhere and anytime on your computer or mobile device.

<sup>5</sup> See Exhibit A, on page 10, for a complete listing of mobile sales force productivity tools.





### Web conferencing

[Cisco Webex](#), [Citrix GoToWebinar](#), [GoToMeeting](#), [Skype](#), [Adobe Connect](#), [Join.Me](#) and [Microsoft Lync](#) are examples of cloud-based meeting, training and presentation tools that allow the sales force to collaborate with many locations simultaneously, allowing everyone to participate at a low cost.



### Voice transcription applications

[Dragon Dictation](#) offers sales personnel an alternative to typing their notes and can come in handy on the road. Alternatively, text-to-voice tools allow mobile users to hear their texts and emails hands-free.



### Contact note applications

The [Notable—Contact Notes Made Easy](#) app allows the sales force to add searchable notes to their contacts so they can remember important pieces of information. [Microsoft OneNote](#) is an app for tablets, phones and computers that allows one to capture ideas and to-do lists in one place wherever you are. [Evernote](#) has many features.



### Business card transcribers

[CamCard](#) and [FullContact](#) transcribe business cards and add them to the sales representative's contact list, not only saving time and but also making sure all contact information is at their fingertips.



### Password managers

[LastPass](#), [Roboform](#) and [SiMan](#) can save time and frustration by eliminating the need to remember all of our many vendor passwords. Each vendor seems to have their own criteria for passwords which can lead to having to remember several different passwords and sometimes change them every few months.



### Personal productivity tools

[RescueTime](#) and [DeskTime](#) are examples of time management software that can be used as personal productivity tools to help sales representatives gain awareness of how they spend their time and be more productive.



### Analytics, sales performance and productivity applications

Having a business intelligence tool that presents key performance indicators on a digital dashboard gives the sales force business snapshots for themselves and their customers. [Hoopla](#) and Salesforce's [Work.com](#) can help drive sales revenue with coaching, motivation, recognition, visibility and feedback. Both also encourage employee engagement at all levels.

## TIPS FOR IMPLEMENTING MOBILE TECHNOLOGY

### Involve the sales force early in the process

Go beyond asking sales representatives for their opinions; actively involve them in the process of documenting current sales processes, reimagining new sales processes, creating customized training programs based on their individual needs, etc. Besides demonstrating leadership's respect of their knowledge and expertise, being responsible for selecting mobile equipment, software and applications gives the sales force control over their own destiny. It also helps to ensure buy-in and commitment to success. Be willing to work with those who are putting forth the effort to adopt mobile technology; consider replacements for those who are unwilling to adapt to a mobile world.

### Train, train, train (*and measure usage*)!!!

While active sales force involvement in technology implementation will enhance collaboration and communication, not everyone will understand how to use the basic functions of a smartphone or tablet computer, much less how to exploit its use to make a sale. No one wants to look inept, especially when their job is on the line. Provide training on how to use smartphones and tablets, how to connect from anywhere, how to access your intranet and ERP system, how to use various apps, how to access cloud storage, how to use social media, etc. While participation in implementation planning also provides time to feel more comfortable with the technology, gain knowledge, skills and improves confidence in using it, it is also important to actively monitor how your sales force is using mobile technology to make sure non-selling activities are being shed and replaced by account and new opportunity development.

Monitoring usage will also help identify when and what training may be needed by specific individuals. Designate tech savvy inside and outside sales representatives as Subject Matter Experts and make sure they have plenty of time available to coach co-workers outside of structured training classes. Studies have shown the first two weeks after a technology change are the hardest, after that the technology usage becomes ingrained. Consider having weekly (*or even daily*) implementation recap sessions to help everyone learn from missteps and suggest "tweaks" to the systems. Celebrate successes as they occur, and keep on training.



# STRATEGIC TECHNOLOGY COMMITTEE RECOMMENDATIONS

## Don't be left behind!

Think about mobile technology in terms of how it can help your company meet customer expectations, gain a competitive advantage over online players and improve sales force productivity.

Maintain visibility into your sales force's mobile capabilities. Use this white paper to stimulate discussion within your company about the challenges and opportunities mobile technology offers. Bring sales leadership together with Information Technology (IT) to create a strategic plan or technology roadmap to help bridge the gap from where you are today to where you want to be with mobile technology.

Be on the lookout for additional white papers from NAED's Strategic Technology Committee, including how technology is changing Marketing and Information Technology and mobile technology for purchasing, warehouse and delivery.

## Exhibit A: Sales personnel technology and tools checklist

Technology and Tools	Popular Examples	Inside Sales	Outside Sales
Access to ERP System with ability to obtain customer specific information remotely		X	X
Analytics, sales performance, and productivity applications	Sales Force's Work.com, Hoopla, etc.	X	X
Anywhere internet connectivity for mobile devices	Wi-Fi, cellular data, etc.		X
Apps for customers		X	X
Apps for internal company use		X	X
Blogs		X	X
Business card transcribers	CamCard, Full Contact, etc.		X
Business intelligence (BI) & analytics software		X	X
Cloud-based collaboration software	Sales Force's Chatter, Microsoft's SharePoint, Yammer, Huddle, etc.	X	X
Cloud storage services	Office 365, Dropbox, OneDrive, Box, etc.	X	X
Company intranet		X	X
Company website & eCommerce capabilities		X	X
Contact note applications	Notable—The contact notes made easy app, Microsoft One Note, Evernote		X
Customer analytics, ad hoc reporting, and project status		X	X
Customer pricing technologies	Net Pricer, TRA-SER, Ariba, etc.	X	X
Customer relationship management (CRM) with mobile capabilities	Sales Force, Tour de Force, etc.	X	X
Customer self-service suite	Order Status, Proof of Delivery, etc.	X	X
Digital signage		X	X
Electronic B2B	Ariba, Oracle Supplier Network, etc.	X	X
Electronic data interchange (EDI)		X	
Electronic signature for proof of delivery	DQ Technologies	X	X
Email		X	X
Email marketing tools		X	X
Employee productivity metrics		X	X
Employee self-service suite	Company policies, benefits, etc.	X	X
GPS vehicle routing & tracking	DQ Technologies	X	X
Industry calculators		X	X
Instant messenger		X	X
Integrated work flow managers to shift tasks from outside sales to sales support teas	Remedyforce.com	X	X
Interactive videos		X	X
Inventory managed for individual customers	Vending machines, trailers, etc.	X	X
Laptop computers			Maybe
Marketing materials and digital catalogs	Electric Smarts SMART e-Cat, RepFiles NAED edition, tEDTV, etc.	X	X

## Exhibit A: Sales personnel technology and tools checklist (continued)

Technology and Tools	Popular Examples	Inside Sales	Outside Sales
Mass texting	SimpleBlast.com	X	X
Master data management	Airwatch.com	X	X
Mobile device management (MDM)	Airwatch.com	X	X
Mobile device security & BYOD policies		X	X
Mobile devices: Smartphones			X
Mobile devices: Tablet computers			X
NAED Learning Center for online training		X	X
Online distributor inventory sharing networks and fulfillment partnerships		X	X
Online marketplaces		X	X
Online pricing watching tools		X	X
Online proof of delivery		X	X
Password managers	LastPass, Roboform, SiMAN, etc.	X	X
Personal productivity tools	RescueTime, DeskTime	X	X
Pricing and product information sources	IDEA, Electric Smarts, Trade Service, etc.	X	X
Punch-out Integration	Ariba	X	X
Push notifications		X	X
Remote access to documentation from mobile device	Dropbox, Office 365, etc.	X	X
Return on Investment software (ROI)	eco-Insight	X	X
Sales force automation (SFA)	Sales Force	X	X
Sales performance & productivity applications	Work.com, Hoopla	X	X
Secure network tools for mobile devices	VPN, security token, Wi-Fi security protection, etc.	X	X
Social media for communicating external to the company and wit customers		X	X
System to track order life cycle from order entry to proof of delivery		X	X
Telephone with conference call capabilities	Landline, VOIP, cell, etc.	X	X
Text messaging		X	X
Third party information integration services		X	X
Time entry/tracking software for company payroll		Maybe	Maybe
Online training	NAED Learning Center	X	X
Unified communications across all devices		X	X
Vendor apps		X	X
Voice mail		X	X
Voice transcription applications for mobile devices	Dragon Dictation		X
Warehouse management systems (WMS)		X	X
Web chat & other specialized communications		X	X
Web conferencing tools	Cisco WebEx, Citrix GoToWebinar, GoToMeeting, Join.Me, Microsoft Lync, Skype, Adobe Connect, etc.	X	X

## RECOMMENDED RESOURCES

### National Association of Wholesaler-Distributors (NAW)

#### **Facing the Forces of Change®: Reimagining Distribution in a Connected World by Guy Blissett**

*(Published December 2013)*

### NAED's Education & Research Foundation

#### **The Path to Disruption: Innovative Technologies & the Electrical Distribution Industry**

*(Published 2014)*

### NAED's Strategic Technology Committee

#### **Executive Guide 5: Mobile Device Security Policy**

Setting up a Security Policy is important for electrical distributors because it mitigates risk exposure, limits liability and damages and reduces operating expenses.

*(Published January 2013)*

#### **Executive Guide 7: Selecting Tablet Computers**

Since the introduction of Apple's first generation iPad®, tablet computers have become essential business tools. This guide defines why mobile devices are important in the industry.

*(Published April 2013)*

### Interesting Articles

[Business Card Transcribers](#)

[Cloud](#)

[Cloud-Based Office Productivity Tools](#)

[Cloud Storage](#)

[Generational Gap](#)

[Implementing Mobile Device Management](#)

[Password Managers](#)

[Time Tracking Software](#)

[Web Conferencing](#)

[Workplace Collaboration](#)

## WHAT YOU CAN DO

Please help us leverage the collective knowledge of the industry by giving us your feedback!

Share your insight and input with the Committee by calling NAED Member Services toll free at 1.888.791.2512 or emailing [memberservices@naed.org](mailto:memberservices@naed.org).

Be on the lookout for additional tools from NAED's Strategic Technology Committee, available for download at [www.naed.org/strategictechnology](http://www.naed.org/strategictechnology).

### UPCOMING TOPICS INCLUDE:

- How mobile technology is changing the roles of marketing and information technology
- Mobile technology for purchasing, warehouse and delivery personnel