

The Situation

SFA and CRM applications offer the promise of world class customer care and sales productivity. Unfortunately, that promise is seldom realized as it requires complete access to customer, inventory, territory and marketing information. Keeping customer and territory information up to date requires a data entry discipline that is seldom the strong suit of the average salesperson. Next, finding a way to conveniently access and view this information while on the road is often challenging.

Mobile Meta Data – Adding Context

Sales Force Automation applications are designed to deliver the necessary information – if they get the required input. The application is simply missing the context associated with each specific user and situation. With this contextual information data entry is minimized, making use (and compliance) more likely. Web pages can be properly formatted properly for a laptop or for each user’s PDA or smartphone. Using mobile meta data can reduce sales data entry and boost productivity and usage by allowing automatic population of user, and account management data based upon physical location and sales rep profile.

The 3P Mobile[™] Mobile Metadata Solution – A Sales Call to China

As part of the customer relationship management infrastructure, an organization that adds the following meta data to its customer, employee, inventory/billing and product information databases can see significant CRM compliance and productivity gains:

- GPS coordinates to its customer database
- Price negotiation limits/override permissions to each salesperson
- Export restrictions to inventory items
- Assigned device IDs to each salesperson
- Data access policies based upon person, device settings and geographic region

Armed with a GPS-enabled device a salesperson traveling to China meets with a customer. A GPS read is taken just prior to entering the customer site. The salesperson now accesses the CRM system via the Web for live customer history, inventory availability and pricing information. They are automatically logged in to both their and their customer’s account information. Only the inventory that meets U.S. export laws to China shows as available and the amounts are displayed properly for the device. The purchase price is negotiated and agreed upon without delay. The customer requests a product schematic, but the request is denied because the device has an active USB port and Micro SD card slot. These types of technical drawings cannot be downloaded when visiting mainland China, due to company IP policies. The entire transaction history may be captured and exported to the sales reporting system. The only data entry required is for the amount of each quote and any personal notes the salesperson wishes to include.

Benefits to the Organization

- Greater CRM compliance
- Compliance with data privacy/security policies for mobile users
- More predictability regarding pricing/margins
- CAPEX/OPEX Efficiencies
 - Reduces mobile application development & update costs
 - Leverages existing CRM infrastructure
 - Reduces the time to deploy new services or policies to the field
 - Minimizes training – user already know how to use their browsers