COSMO CONSULT
Business-Software for People

CRM

Customer Relationship Management

Business
software
for people

Mobile CRM is Dead!

MOBILE CONCEPTS

INTERFACES

KEY CHALLENGES

SMARTPHONE

MOBILITY

TABLET

DESKTOP

FUNCTIONALITY

RESPONSIVE

TECHNOLOGY

USER ACCEPTANCE

MAC

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PREFACE

Dear readers,

CRM has become an integral part of day-to-day business. The efficient and comprehensive management of customer relationships and business processes forms part of a modern, customer-oriented business world and creates competitive advantages. Also mobile CRM is a matter of course today.

But: The wheels are turning quickly and mobile CRM-solutions in their original form – as "on top" application – are dead. The time has come to think responsive also in the area of CRM. Find out in this white paper why mobility for business applications has become matter of course today and why responsive concepts are required in order to conciliate processes, devices and applications.

Enjoy reading!

Yours sincerely, Patrick Weilch

CONTENT

Mobile CRM is Dead!

Why "simple" mobile strategies are already outdated.

ABOUT THE AUTHOR

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After studying business informatics at the Johannes Kepler University Linz, Patrick Weilch started his career at Fabasoft AG, where he was responsible for the evaluation and introduction of E-government solutions in Switzerland. He subsequently took over the job as a Brand Manager at JoWooD Productions Software AG where he was responsible for market research, sales support and project management.

Mr. Weilch worked with HC Solutions GmbH from 2005 to 2008, initially as a Product Manager for industrial solutions, later as a Sales Manager and as Head of Sales and Marketing for the CRM Consulting business division.

From 2008 to 2014, he worked in a managerial position for the expansion of the CRM business division of FWI Information Technology GmbH.

He has been the General Manager of the current COSMO CONSULT SI GmbH (formerly FWI Information Technology GmbH) since 2014. Patrick Weilch has an MBA in Global Marketing Management.

INTRODUCTION

It is more important than ever for companies to be close to their customers. The proverb, "The consumer is the boss" is regarded as a maxim of many companies in different industries. Tailored customer communication, from initial contact to long-term customer retention, is the credo. But only if you know your customers well, you can serve the individual requests and secure your corporate success. This means primarily: collect, manage, organise, analyse data and make them retrievable at any time. This is the job of CRM-systems.

Today, many CRM systems are available in so-called public clouds of system providers or in private clouds of data centre operators. This allows the necessary mobility and enables access to the collected information from marketing, service and sales which are bundled in one platform anyplace and anytime. This is the only way to create and exploit synergies between departments on the one hand, and, on the other hand, meet the requirements of modern, interdisciplinary teams.

A consistent data base as well as the sustainable maintenance of the data are essential for efficiency, transparency and planning of business processes. Companies able to map the entire "lifecycle" of their customers in one platform are clearly at an advantage. They improve their profitability through the use of CRM-applications and the associated, improved organisation as well as automation of business processes. Hence, it comes as no surprise that CRM-systems are a mass-product today.

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MOBILE CRM IN PRACTICE

> *MOBILITY IS EVERYWHERE TODAY – IT IS TO BE SEEN AS A MATTER OF COURSE.*
> *TODAY, MOBILITY CAN OFFER ALMOST EVERY APPLICATION.*
> *THE BIGGEST CHALLENGE IS TO PROVIDE THE MOST SUCCESSFUL OUT OF FUNCTIONALITY,*
> *MOBILITY AND USER FRIENDLINESS TO THE USER.*
> *THIS REQUIRES FAR MORE THAN AN APP.*
>
> PATRICK WEILCH
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Not only static but also mobile CRM is omnipresent today. It is a central challenge of companies to make the interaction of field service (sales and service) and back office (sales, marketing and service) as efficiently and effectively as possible. This requires mobile applications. The use of this has been a hot topic in the executive suits and technical departments of companies for years. A large part of the companies which do not offer their staff mobile access to the customer database plan on expanding or remodelling their CRM system.

Because mobile CRM applications are no longer just "nice to have" but a "must-have" – a necessary condition to meet the demands of customers, as well as of sales and service staff and to stay fit for the future. Tablet, smartphone and the well-developed broadband network have contributed their crucial part and make mobile working possible in general.

Field staff in particular benefit from the handy technologies – especially if they have access to the customer data from the CRM-system of their company. They can access the stored data and notes for customer meetings, be it for preparation purposes or during the meeting. The following work (e.g., visit report) is omitted or is reduced to a minimum – provided, of course, the mobile client delivers what it promises.

! PROCESSES, TECHNOLOGIES AND REQUIREMENTS OF THE RESPECTIVE USER MUST BE TRANSLATED INTO A MOBILITY STRATEGY.
THIS TURNS TECHNICAL POSSIBILITIES INTO MOBILE SUCCESS STORIES!

Mobile CRM is Dead!
Why "simple" mobile strategies are already outdated.

3 MOBILE CRM PITFALLS

As much as mobile CRM can be helpful, it often also does not suit the requirements of the respective user groups. People expect, in addition to the possibility to analyse data and use the CRM offline, especially comprehensive support in operational processes and ease of use. These requirements placed on the CRM application are sometimes not met. User acceptance suffers greatly because of that and the technology actually intended for support is perceived as annoying. The result: The system is only used reluctantly, the valuable potential of the technology is wasted.

Pitfall 1 – user acceptance
Many users of mobile apps expect that they must be very easy to use. Among other things, this is due to the fact that the usability aspects of everyday life apps are transferred to business applications and are placed as core requirements. These expectations with regard to usability and user interfaces, however, usually do not comply with the requirements on the functionality and process-oriented design of mobile CRM. The excessive focus on design and usability in order to achieve a high degree of user acceptance impedes what is decisive, i.e., functionality. An aesthetically appealing presentation alone helps neither with the long-term establishment of customer relationships nor with mapping business processes. This requires a new way of thinking or a return to tried and trusted recipes in a "new" world according to the principle "form follows function".

Pitfall 2 – different user interfaces
Another major disadvantage of conventional mobile CRM apps is the adapted user interface due to the reduction of complexity and adaptation to the respective device. Hence, the CRM has different looks for a user – depending on which "version" they are currently using. This requires rethinking and knowing your way with multiple user interfaces and the respective functions.

Introducing mobile CRM systems therefore requires training for dealing with different versions of the mobile application (i.e., on various devices). The diversity of user interfaces also has a negative effect on user acceptance.

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Pitfall 3 – limited functionality

What is still widespread is the development of native applications on the basis of the existing CRM-system. The standard version of the CRM-system, however, is equipped with a high degree of functionality which cannot be translated into mobile applications. Apps therefore typically map only part of the data which is absolutely necessary for the respective user group or a specific part of the data and especially processes integrated in the CRM.

Example: A mobile app for the sales staff of a company provides access to customer master data. Information on the history of the customer, etc. are available on an ad-hoc basis. But: The sales employees do not have the rights to access the latest marketing campaign, outgoing invoices, links to previous quotations or other dynamic connections. Among other things, this is due to the fact that the screens of standard apps cannot be adapted to users

because this would require special components. This function, however, is important because with access to additional information, a customer meeting can be conducted more comprehensively and more professionally!

Due to the limited functionality of standard apps, finding and using relevant information as well as synergy effects is clearly limited. In addition, many activities or updates again need to be made from the laptop or desktop versions.

Hence, the salespeople, for example, can consume information from mobile devices, but need to use the desktop version of the CRM again for their follow-up report.

MOBILE CRM

- PC
- Mac
- Tablet
- Smartphone

- Windows
- iOS
- Android
- Windows Phone,
- etc.

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KEY CHALLENGES

In the past, business applications have been primarily developed device-related. But this does not help many companies. Consultants and developers offering CRM-solutions, today more than ever, must much more begin at the individual processes of a company and declare this the cornerstone of the mobile strategy.

This way, the requirements of the different user groups as well as the specific business goals and the assignment of rights in the CRM are considered from the beginning. Mobile does not mean downloading standard apps but thinking mobile – that is the challenge. Processes, devices and applications must be harmonised and tailored to the company and its processes.

CRM-systems are no longer rigid databases but dynamic applications which will be used by users with different requirements independent of location and time.

Contemporary mobility concepts provide the possibility of mobile, device-independent complete access to the CRM. This requires a mobile back-end where user groups are created and appropriate rights are assigned. This is the only way that all users get the information they need to do their jobs. And also the only way for mobile CRM being a gain and not a burden. Good operability is and will continue to be important but should not be given top priority.

Key challenges of mobile CRM-strategies at a glance:

▶ Ensure device independence

▶ Individual business processes as a basis for mobile strategy

▶ Attach equal importance to user friendliness and functionality

▶ Include different user groups, corporate objectives and rights concepts in the mobility strategy from the outset

▶ Harmonise processes, devices and applications

▶ Avoid rigid databases

▶ Responsive thinking

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RESPONSIVE THINKING

To meet the challenges and to escape the dilemma, thus the time for responsive thinking has come. We need concepts considered holistically which make the CRM a big picture and join the advantages of static and mobile CRM. Mobile add-on applications in the form of native apps are thus dead. Resco, for example, pursues a client mobility approach already including many responsive characteristics. A simple operating concept for all devices and platforms. Only the size of the device or display determines the scope of information. Approaches like this will be used in future-oriented mobility concepts.

The idea of developing specific apps or websites for mobile platforms was quite correct in recent years as mobile devices used to differ significantly in their functionality from laptops and desktop computers. However, this principle is no longer valid with the current technical progress. Today, business applications must be developed with a cross-platform design concept allowing the user to use the same functions with different devices. Responsive, dynamic concepts, passive data entry and processing give way to a process-driven input behaviour. This means that we are moving away from completing forms to applications maintaining processes in addition to data management and storage.

Modern CRM applications are process-driven systems that not only require a certain format but also a sequence from the user. Today, this goes well beyond the standard sales process and is used in complex marketing and service processes in CRM-systems. Knowing the right information at the right time with the right user is much more important today than obligating the mobile worker to data entry regardless of where they are. The responsive approach and the process-orientation achieve one thing above all: Information is distributed depending on the process and must therefore also be returned granularly. This is mobility: smart data and information handling.

> **!** MOBILE IS DEAD – AT LEAST IN THE SENSE OF NON-RESPONSIVE, MOBILE CONCEPTS.

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PREPARATION QUESTIONS FOR A CONSULTATION REGARDING MOBILE CRM

1. Who in your company uses mobile CRM or who should use it?

2. Which facilitations and improvements do you expect from mobile CRM?

3. Will you rather consume information or also collect them mobile?

4. Will you also consume or collect media content mobile (such as PDFs or images)?

5. Which information must also be available offline?

6. Which functions must also be available offline?

7. Which functionality must therefore be covered mobile as a minimum?

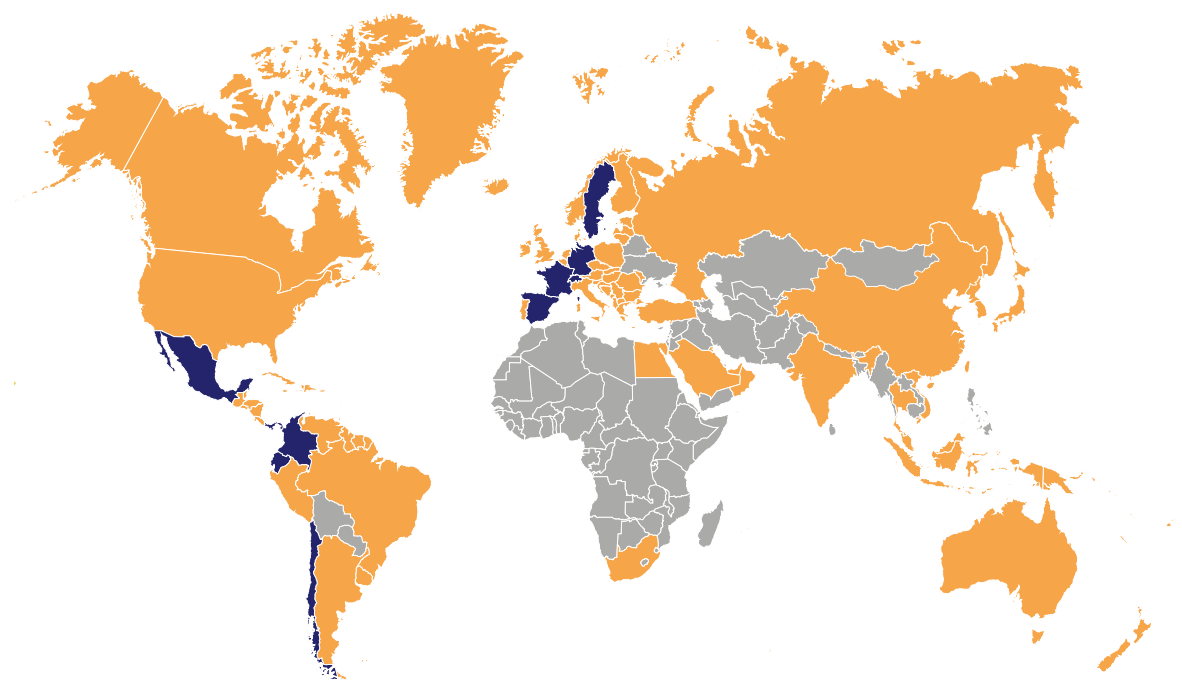8. Which functionalities are absolutely necessary, which are helpful and which are "nice to have" but not absolutely necessary?

9. Which devices do you use in your company as mobile devices?