

## CRM goes mobile: Money on legs

James Smith - 04/02/2002

**Your customer is mobile. Your business should be as well. That's why M-CRM could liberate your staff and change the way you make sales.**

Filipino utility Maynilad Water has over 4 million customers in Metro Manila. Of these, the majority have incomplete addresses – and 98 per cent are not able to pay through a bank, in many cases because they don't have a bank account. But the bills go out, and the payments come in. How? Maynilad Water, like many companies across Asia, has a large field salesforce who walk the streets day-in and day-out, bridging the gap between enterprise and customer.

For Maynilad Water the telephone or the web may one day be a useful business tool. But with less than one in 10 Filipinos having access to a domestic telephone, the utility is focusing its efforts on ensuring that its billing agents have the tools for the job. M-CRM tools that is.

### M-CRM?

M-CRM extends CRM to mobile workers through client software that lets users with mobile devices or Personal Digital Assistants (PDAs) tap server-based CRM functionality. Research company Datamonitor predicts that global sales of M-CRM software will grow to US\$1.7 billion by 2005, up from around US\$118 million this year.

It's not just the less advanced markets that are turning on to the potential of wireless relationship management. According to the Aberdeen Group, over US\$30 billion has been invested in CRM globally since 1998. That buys a lot of screen pops, and represents a large collective grouping of (theoretically) CRM-savvy enterprise. Because CRM represents such a large commitment, in terms of money and implementation effort, embracing M-CRM is a relatively easy step to take.

### Spread the love

If you employ someone for their sales ability, you want them to be doing what they do best as much of the working day as possible. Road warriors are not meant to be trotting back to the office after every meeting. Most of the time, however, this information is available only to the office-bound. This results in a sales process that is long on taxi receipts, and short on sales. And of course this doesn't just hold for sales. Field service is another expression of CRM and a key focus for businesses looking to strengthen the loyalty of their customers.

Businesses capture a lot of critical customer

information: spending patterns, communication channels, billing preferences, cost-to-serve, lifetime value. Clever organizations share this knowledge with employees, who in turn use it to serve customers better, and sell to them more effectively.

M-CRM allows this to extend to your road warriors – transforming them into relationship managers that are just as equipped for the job as your call centre's CSRs. Maintaining a consistent level of customer service, across different service delivery channels, is a key corporate objective: customers will remember organizations whose pre-sales promise was followed up in a post-sales environment.

### These legs were made for walking

Empowered M-CRM agents are a conduit of fresh customer information. Contracts don't walk through the door, they have to be found. But you don't have to be a salesperson to make a sale. M-CRM enables non-traditional sales operatives to effectively cross-sell in consultative and service-support situations.

A trained field service agent able to tap into enterprise information systems becomes a universal agent. By including service agents within the sales and marketing information loop, they become better able to recognise and act upon sales opportunities – and provide better levels of customer support as a result.

For Fuji Xerox, when a field service agent tinkers with a customer's photocopier he or she has the opportunity to assess the state of the client's other related infrastructure. Not only does this kind of preventative service keep support costs down, it provides opportunities for new service contract upgrades, and builds stronger bonds between Fuji Xerox and its client. With true M-CRM functionality, a PDA enables contracts to be updated immediately whilst the service agent is on-site.

The role of the field service agent in identifying commercial opportunities is not new. The leverage an organization can get from data captured by field service agents is however far greater when it is plugged into an enterprise CRM infrastructure.

### Platforms

Of course this rising interest in M-CRM is only possible thanks to continuing healthy sales of PDAs. According to IDC the Asia Pacific (excluding Japan) handheld market will grow from last year's 2 million units, to 20 million units by 2005. But just as mobile enterprise applications feed off the availability of an installed base of PDAs – so sales of PDAs will be increasingly driven by M-CRM and related solutions.

Asia has finally woken up to the business potential of the PDA, says Cynthia Lim a senior analyst with IDC: "We see China as the region's growth catalyst and the hot spot as every player vies for a share of this burgeoning market," she notes.

Lim believes that the corporate market for M-CRM and other mobile enterprise applications is heating up – the future of the PDA market is strongly linked to the value proposition of the PDA as a wireless relationship management tool. The Asian market has seen a major shift as employers seek to integrate the use of handheld devices into the corporate network.

Palm trail-blazed with its series of slim handsets, and intuitive operating system. Recently it has come under a lot of pressure (it lost its CEO a few months back) with the entry of Compaq's iPaq and HP's Jornada into the marketplace. Though they are late to the party, Compaq and HP have got off to a good start by running a scaled-down version of Microsoft Windows for its operating system – Microsoft CE – and the companies' handhelds run substantially more powerful processors. Palm is fine for writing shopping lists, but when it comes to enterprise applications in the field, the newcomers have the advantage.

"With the extra storage 'headroom' that external storage provides, an enterprise can roll out substantial amounts of information to its field organization – where it can be stored locally on removable memory media. Prospect lists generated by a company's latest marketing campaign, product pricing, inventory levels, technical product specifications all can be stored and accessed without the need for an online, wireless connection," argues Christopher Fletcher of Aberdeen's CRM practice.

M-enabled using bluetooth & wireless LAN. When it connects on mobile phone, it can work on GPRS & GSM. This is our answer to front-end solutions. An end-to-end solution. When it comes to CRM, there is going to be a fair amount of utility power at the back end - eg., data mining capability (back-end) and inventory (frontend) or even yellow pages for directory systems, through personal information management.

"We see M-CRM as a connected solution to back-end technology," says Kelvin Tan, Director for Mobile E-services in Asia Pacific for Hewlett-Packard. "That's why we run a 'mobile ecosystem' programme where

we encourage partners to develop wireless enterprise applications."

According to Tan, there has already been a significant uptake in certain vertical sectors for his company's Jornada PDA – particularly in finance and insurance.

M-CRM is perfect for insurance agents, for property agents – and also for remote learning, whether academic or vocational, believes Tan: "We have just completed a trial at Changi International Airport – a location-based application giving access to targeted customer information and promotions, based on where you are in the airport."

### **Real 1-to-1 marketing**

Field service representatives receive a unique degree of customer trust. They are allowed into offices and homes. That represents a genuine 1-to-1 relationship that has nothing to do with universal queuing or interactive voice response.

Despite all the talk of personalising the customer experience, much of the discussion still revolves around removing people from the interaction with the customer. The desire to make relationship management scalable has focused upon automation. IVR is the most obvious example, but you could just as easily point to web self-service, 'closed loop' marketing and a host of other CRM 'innovations'. Yet when it comes to field sales and service, there is no escaping the human dimension.

M-CRM is, ultimately, a productivity tool. It assists the field sales or service agent to 'know the customer', but doesn't automate the business of customer interaction. That still has to be done in the flesh, on the doorstep or in the prospect's office.

Field sales and service agents get out amidst your customer and prospect base and are amongst the best relationship managers you have. Sensitive to the needs of the customer, as well as your business, they are potentially a source of vital market intelligence. Now if you develop a channel for sending customer data back to your company and integrate this information into other sales and marketing applications, you will be better-placed to understand your market and develop stronger, more profitable relationships.