CRM at Your Fingertips
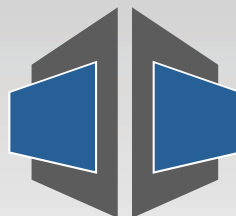
Mobile CRM Pros and Cons

What is Mobile CRM?

Mobile Customer Relationship Management is a kind of CRM application that is developed to be used through mobile platforms. The idea behind Mobile CRM is that companies can manage interactions with both current and potential customers or clients using mobile applications on mobile devices – either cell phones or tablets. Organizations are able to use Mobile CRM to add, edit and manage customer relationships in this way. In many cases Mobile CRM has the same sorts of features that regular CRM has. This is frequently the desired goal of Mobile CRM. As Microsoft explains of its Mobile CRM product offering:

There have been some major drivers for the advancement of Mobile CRM so much at the current time. One is the way in which iPads and other tablet devices have become so quickly adopted by business. Many organizations give field-based employees tablet devices rather than laptops. One research figure clearly demonstrates this – iPads were first launched in early 2010. By that summer, statistics had already emerged that 50 percent of Fortune 100 companies were thinking of using iPads. By December 2010 this increased to 80 percent of Fortune 500 companies. iPads and other similar devices have quickly been adopted into the operations of organizations. The other trend that has led to the advancement of Mobile CRM has been the realization that with smartphones, field workers

> "It does everything you would expect a Mobile CRM solution to do, and much more. It makes all of your core CRM functions available to your mobile workforce".

Mobile CRM is one of the fastest growing types of CRM. Gartner research shows that the number of Mobile CRM apps that will be available in app stores by 2014 will be more than 1,200. This is a growth of approximately 500 percent compared with projected figures for 2013. It is anticipated that Salesforce will be the largest mobile CRM vendor on the basis of revenue during 2013.

can always be kept up to date. Smartphones allow field staff to receive instant notifications from head office. It is thought that these changes have really driven Mobile CRM forward in the last few years, and Mobile CRM is becoming rapidly adopted by many organizations.

Mobile CRM: The Pros

Many Mobile CRM providers specify that these solutions offer organizations competitive advantages. That is because they allow people to work while on the move, enabling employees to be able to be more proactive in the field. This is said to be the case for both field sales staff and mobile CSRs, though especially the former. This is a fair assertion since mobile allows employees to act in the moment to help potential customers and existing customers. This serves to improve the relationship with customers. However, if the Mobile CRM system does not really meet the needs of its users, or if it is clunky and ill-thought out then it will not be helpful, and this benefit will not be realized for your business.

Above all else it is important to get the right requirements of the Mobile CRM from the start. If this does not occur, then there is a serious risk of the end users not adopting the system in the way that they otherwise might. Gartner recommends that the most important steps that businesses thinking of implementing mobile CRM can take is deciding how to make CRM apps as usable as possible. User-friendly mobile CRM applications will be more accessible to employees and consequently more likely to be a success. It is also highly recommended that performance is a focus, so that apps do not take too long to load, and so that the page design is not too heavy for phones to load easily.

Another positive of Mobile CRM is that the productivity of sales people is thought to be likely to increase as a result of implementing it. Research by Nucleus Research in 2012 found that adding mobile access capabilities to CRM has the outcome of increasing the productivity of sales people by more than 14 percent. The size of the company was not relevant to this. In particular it is said that with Mobile CRM production and planning processes can be faster. Orders can be placed more quickly or changes made more easily and problems solved faster, and this has the potential to increase customer satisfaction.

One benefit of Mobile CRM is said to be providing employees with timely and relevant up to date information. It is arguably possible to achieve this with a laptop in the field. However, being able to carry out CRM activities on a cell phone perhaps means that it is more likely that such tasks will be carried out by employees, since most carry a cell phone and not all a laptop when they are out and about with customers. The increase in organizational take up of tablets is also relevant to this. Since employees can access CRM from the field using Mobile CRM they can keep contacts up to date, seek out desired information and always be able to find the most up to date customer information. This means that Mobile CRM users can be increasingly more responsive to customer needs.

Some systems may at first appear to be a good option because they are free. However, there are benefits and drawbacks of this. Of course, it is cost effective from an initial outlay perspective if the system is free. However, on the down side, these free systems tend to be the least useful as there is no customization to meet the specific needs of the organization. In many cases, the more that you are able to pay, the more likely it will be that the system can be developed and personalized for your specific business and employees.

Mobile functionality allows employees to perform previously unimagined activities with Mobile CRM. That is because mobile systems provide functionality that computers do not. One example is that mobile devices use data from GPS, which can be uploaded into CRM systems. Another is that it is possible to do voice recordings with Mobile CRM, and this can be more challenging with a regular computer monitor. In addition, mobile smartphones can capture photos – another activity that computer monitors cannot do. All of this can be done on the move. If it is possible to anticipate benefits for your business in doing any of this then Mobile CRM may well be worth the investment for your business.

Working with mobile is a way of working that is particularly comfortable for younger members of the workforce. The Millennial Generation has grown up with cell phones in their lives. They often do not remember a world without cell phones in

it. They are quick to adopt new functionality and ways of working via smartphones because it is familiar to them and it is how they organize and navigate the rest of their lives. For these workers, Mobile CRM will just seem like a normal way of doing things. They will find it to be relatively easy

> Sales persons' productivity increases as a result of Mobile CRM implementation.

to adopt and they will be likely to embrace the new way of working. Indeed, research has found that some users find a Mobile CRM system to be empowering, which has the added bonus of increasing their job satisfaction. This means that you will be likely to get more out of your employees.

Mobile CRM: The Cons

Mobile CRM is in its infancy. The concept is in its very early stages and is not completely refined at this time. That means that there is still a way to go before what Mobile CRM is completely

clarified. Some organizations may wish to hold off for a little while until it becomes clearer what Mobile CRM actually is and until there are more documented examples of statistics to back up claims of increased productivity.

Because it is early days for Mobile CRM, not all of the options out there necessarily meet the needs of the organization. Some reviews of Mobile CRM systems have found that they are too simple and cannot be adapted to meet the needs of the specific organization. Others have

> Mobile CRM is still in the early phases; consequently, some solutions are not tailored to the needs of every organization.

been described as difficult to use, or challenging for data entry. It is worthwhile to fully brainstorm and work with field workers to understand what would make their lives easier in terms of Mobile CRM, rather than just purchasing something that seems to look good without doing proper analysis. If the Mobile CRM system ends up making employees' lives harder then they will be less likely to use it, and that could result in it

being a waste of money.

Cost can be prohibitive to deciding to take on a Mobile CRM system. Some systems are offered on a per-user license fee basis. If your organization has a lot of employees out in the field this means that costs can add up very quickly. Some of the Mobile CRM offerings provide better discounts for large numbers of users, but that usually just means that these systems are very expensive for those with just a few users, so these solutions might be out of reach of some small businesses. Add that to the fact that some systems require a third party to keep them updated and that you have to organize updates and the system does start to become quite expensive.

Importantly, if your company has no mobile workforce then implementing Mobile CRM would appear to have limited benefits at the current time. The idea behind Mobile CRM is that it supports mobile workers in the field to improve their productivity and performance. If there are no mobile workers in the field, it is unclear what the other benefits of implementing such a system would be in an organization. Of course, a great many organizations do have mobile workers in the field however. The most common types of field workers are sales people who feed into the early stages of the CRM process when they make initial contact with the customer. Additionally, some companies do have CSRs operating in the field, and for these individuals such a device would likely be invaluable.

Mobile CRM brings with it questions of security, especially data security. Mobile CRM system vendors will explain that their systems have excellent security. By using the cloud data can be stored effectively, but it is definitely worth organizations that are considering the use of Mobile CRM to review the security measures that the vendor puts in place to protect the company's data. This is not necessarily a "con" per se, but companies adopting Mobile CRM should practice due diligence in doing the research to make sure that the solution will really meet their needs, and that it will do so in a safe and secure manner that will not compromise organizational data.

Some CRM systems do not work across all types of devices or platforms. This may mean that they are not a good option for your business if you operate across a number of different devices or platforms. Some Mobile CRM systems only work on iOS (Apple) platforms, while others are only suitable for Windows or Android. Others work on Android tablet devices but not on Apple tablets. Before purchasing any system this is a critical point to check. For maximum flexibility you may need a system that works on Apple and Android platforms for tablet and for mobile. In some cases you may need the system to work for Windows Phone also. A Mobile CRM system that is most suitable will be one that works on all of the following: Android phones and tablets, Apple iPhones and iPads, BlackBerry phones and tablets, Windows Phones and other mobile devices that your organization uses. On that note, Nucleus Research found that 63 percent of companies determine the type of device and platform that the employee will use to access the Mobile CRM system. However, getting everyone on one system could be extremely costly in itself, if the organization is not currently consistent in this regard. Good Mobile CRM systems work well across all of these devices and are specifically designed for them – it is important to realize that Mobile CRM is not just the same system as for regular CRM accessed through a mobile device. It is designed to work effectively for the employee in a user-friendly manner.

Vendors of Mobile CRM

There are a number of different vendors of Mobile CRM systems. The most important are considered to be the following, and with the exception of Microsoft, all updated their systems in 2013:

- Base CRM – this one works on Android and Apple tablets as well as on iOS, Android and Windows Phone. It has free mobile access.

- Elements CRM – this only works on Apple – iOS tablets and mobile. It too has free mobile access.

- **Microsoft Dynamics CRM** – this works only on a Windows phone and not on Android or Apple tablets or mobile. It has free mobile access.

- **Oracle CRM** – this one works on Android and Apple tablets as well as on iOS and Android mobile. It has free mobile access.

- **Salesforce** – this functions on Apple tablets but not Android. It works on both the iOS and Android mobile platforms. It has free mobile access.

- **SAP CRM** - this one works on Android and Apple tablets as well as on iOS and Android mobile. It has free mobile access.

- **Update.CRM** - this one works on Android and Apple tablets as well as on iOS and Android mobile. It has free mobile access.

- **Zoho CRM** - this one works on Android and Apple tablets as well as on iOS and Android mobile. It does not have free mobile access.

Summary

Mobile CRM is still a very new concept. It is good for businesses that are very mobile, especially businesses with a mobile sales force. It is also useful for organizations that have customer service representatives that are in any way mobile because it increases the quality and reliability of the information in the system, since information is updated in a timely manner, rather than when employees are back in the office. It has already been proven to increase productivity and efficiency in some business environments.

There are many factors that companies should consider if adopting Mobile CRM. One of the most important is the users that will be accessing the system on a daily basis. Understanding their needs can increase uptake through better meeting their requirements. Some advantages such as a system being free may end up being more costly in the longer term as users struggle with a system that does not really meet their needs and does not add value.

Some organizations may find it beneficial to wait until Mobile CRM has become more established. At that point it will be clearer exactly how Mobile CRM can fully benefit organizations, and which types of businesses are most likely to benefit from these systems. Either way, systems that operate across a variety of different platforms and devices will be the most flexible and adaptable for your business, and will not force you to limit your organization to either iOS or Android in the longer term.

References

BiznessApps (2013) "Five Reasons to Adopt a Mobile CRM Solution", BiznessApps.com, accessed 09/08/13: http://www.biznessapps.com/blog/2013/02/26/5-reasons-to-adopt-a-mobile-crm-solution/

Cynamon-Murphy, J. (2013) "CRM Mobility Options Demystified", Sonoma Partners, accessed 09/08/13: http://blog.sonomapartners.com/2013/02/crm-mobility-options-demystified.html

Dickie, J. (2011) "Mobile CRM: The Quiet Explosion", Destination CRM, accessed 09/08/13: http://www.destinationcrm.com/Articles/Columns-Departments/Reality-Check/Mobile-CRM-The-Quiet-Explosion-75283.aspx

Loga, O. (2013) "Mobile CRM and its Advantages", Xing, accessed 08/08/13: http://www.xing.com/topics/en/mobile-crm-and-its-advantages-26407

Nucleus Research (2012) "Market Focus Report: The Value of Mobile and Social for CRM", Nucleus Research.

Rivera, J. and Van Der Meulen, R. (2013) "Gartner says number of Mobile CRM Apps Downloadable on App Stores to Grow to Over 1200 by 2014:, Gartner Newsroom, accessed 08/08/13: http://www.gartner.com/newsroom/id/2421015

Techopedia (2013) "Mobile Customer Relationship Management (Mobile CRM)", Techopedia, accessed 09/08/13: http://www.techopedia.com/definition/28451/mobile-customer-relationship-management-mobile-crm

TenDigits.com (n.d.) "Why Mobile Access?" TenDigits.com, accessed 08/08/13: http://www.tendigits.com/why-mobileaccess.html

Wikipedia (2013) "Comparison of Mobile CRM Systems", Wikipedia, accessed 09/08/13: http://en.wikipedia.org/wiki/Comparison_of_Mobile_CRM_systems

Wooden, D. (n.d.) "Business Benefits of Mobile CRM", Success With CRM, accessed on 09/08/13: http://www.successwithcrm.com/blog/bid/86816/Business-Benefits-of-Mobile-CRM