The TeamSFA Business Case
Mobile Sales Force Automation

teamsfa

Go the extra mile across the miles

The pace of customer service excellence has been set, and it's fast. You simply can't afford to have your salespeople lagging behind the pack in the race for revenue. Enabling your field workforce with TeamSFA will help them do their jobs better, shorten the sales cycle, improve first impressions and follow-through, access hot leads faster, and generally become more productive. TeamSFA will help your management team better supervise and direct sales activities. Plus, increasing adoption of mobile technology will increase the flow of business information, which, in turn, yields deeper business intelligence.

TeamSFA empowers you to go the extra mile for your mobile workers today, by giving them the tools they need to succeed. The payoff will be quick, and will only increase in value as your field productivity turns from business advantage to business expectation.

Frontline employees drive your competitive edge

As competition becomes increasingly fierce in today's markets, organizations are intensifying their search for new efficiencies. Successful companies have long known that a well-trained, highly motivated and efficiently connected field force is critical to their continued growth and success. These companies realize that to stay ahead of the competition, they must replace traditional paper- and telephone-based systems with solutions that enable access to key information directly from the field. Mobile technology holds the greatest promise for creating new business efficiencies and developing competitive advantage.

As such, leading organizations are realizing significant gains in performance by deploying mobile solutions that allow field workers to share critical data on customers, orders, assets, and inventory. Whether they are closing sales, managing relationships, helping customers, your company's remote workers rely on up-to-the-minute information access for their success and yours.

Equipping your sales force with Windows Mobile smartphones provides them with immediate access to customer and product data and also enables them to quickly and efficiently close business. This ensures extraordinary customer service, and translates into intense customer loyalty, leaving the competition wondering where they went wrong.

Small and mid-sized companies have few IT staff, but they have large enterprise requirements and expectations of their IT solutions. TeamSFA is an enterprise-class solution that helps you better manage your business data, gathering it, storing it, sharing it, analyzing it.

Drivers for Wireless Strategies

The lifeline for today's mobile workers, particularly sales professionals, is the cell phone. When they have questions that need immediate answers, need a data look-up, or want to submit an urgent customer order, they place a call to an administrative assistant and dictate their requests. This is a process that can take several minutes or more and ties up at least two people until it's resolved. Wireless applications turn this into a one-person operation.

Without wireless applications, many salespeople are flying blind when they visit a customer or prospect site. Wireless applications place information at their fingertips in real time as needed. They improve not only their customer service, but the customer's perception of the entire organization's service.

Consider the mobile worker's time management abilities. It has been estimated that the typical salesperson spends about 10% of their time waiting for appointments. Consider what you are paying your sales people, and then take 10% of that number. It's a lot of money that would look better on the bottom line. Mobile applications allow them to use that time productively, either looking up customer call history prior to the meeting, entering orders, answering e-mail, or taking care of other business tasks. They are able to do significantly more than they can with a simple cell phone.

A third issue is that salespeople often do not receive new sales leads in a timely fashion. Generally, they have to wait until they return to the hotel or home office at the end of day. Now, consider a wireless user sitting at a restaurant with a Wi-Fi hot spot, or one of the latest Windows Mobile smartphones. The mobile worker can sync, and check for new, hot leads and make schedule adjustments to get the best opportunities first. They can even build customer quotations and instantly deliver an email or faxed copy to their customer in seconds, versus hours later.

Unlike bulky laptop systems, Windows Mobile handheld computers turn on instantly and are very compact. As a result, sales professionals tend to use the devices before, during, and after sales calls much more readily than they do laptops. This convenience and ease of use translates into more and better data from representatives in the field, which means better forecasting, better customer service, and competitive activity tracking for management. Handheld access also allows representatives to productively use their downtime to prepare for meetings and to follow up with customer requests. This results in a more effective sales force and better customer interactions.

Wireless devices are making it easier and easier to gather and share data anywhere, anytime. But productivity won't be realized if remote workers are not equipped with mobile applications in the first place.

Finally, there is often a challenge with sales force automation software, particularly Customer Relationship Management (CRM) systems. CRM applications are designed to provide management data, rather than improve workflow for people in the field. These applications are typically laden with many features and functions mobile workers don't need or can't use. Navigating the menus and options is often slow for remote wireless users, which ultimately causes confusion, frustration and abandonment of the application. A recent Sales Management and Field Sales Representative study found that:

- Less than 50% of sales reps are using their CRM/SFA system the way sales management would like
- The top three obstacles for not using the CRM/SFA system more often were that these systems are too time-consuming, difficult to access and provide limited value in the field
- 72% of field sales representatives spend more than 50% of their time away from the office
- Over 80% of those surveyed believed that a PDA sales solution would make them more productive in the field
- 90% of sales reps would use their CRM/SFA system more if they had handheld mobile access

Widespread adoption among the field sales force ensures that the SFA system contains all your critical customer data; and with viable customer data, the value of SFA begins to be realized. Sales professionals are the crucial link between the customer and the enterprise. Consistently, sales representatives pin the blame for low SFA adoption on their systems' poor accessibility, usability, and relevance to their day-to-day job functions. In addition, these systems were deployed primarily as tools for sales management for more consistent sales process, sales forecasting and pipeline management, rather than as tools for sales professionals to engage in more effective and efficient customer interactions. The field sales survey previously referenced studied the potential impact of mobility on SFA adoption:

⮥ 90% of sales representatives would use their SFA system more if they had handheld mobile access

⮥ Over 80% of sales representatives believe that a mobile SFA solution would make them more productive in the field

⮥ Over 50% of sales management believe a mobile SFA solution would increase customer satisfaction and contribute to higher revenue growth

TeamSFA solves these challenges and delivers tangible cost reductions that are realized by increased sales productivity, sales force retention, reduced data collection/entry, increased information accuracy, and reduced costs of operations. Top line revenue growth is further achievable through increased sales force and sales management effectiveness, sales process optimization, and increased customer value.

Calculating Return On Investment (ROI)

The four criteria that are the most common drivers for mobile workforce automation are:

⮥ Boosting productivity
⮥ Cutting costs by automating existing processes
⮥ Improving revenue generation
⮥ Building competitive advantage

The first two goals typically involve up front ROI analysis unique to a customer's business. Just as often, we find companies that see clear competitive advantage, who determine that no formal ROI calculation is necessary to secure funding.

The following calculations assume a $35 hourly salary, or $72,000 annual income.

Boosting mobile sales productivity

TeamSFA unlocks the full potential of existing technology investments by enabling automation for mobile teams with real time, actionable information. By eliminating redundant data re-entry, enhancing communication and enabling a paperless sales management solution, TeamSFA will boost mobile worker productivity.

Research from the Jupiter Company contends that Field Force Automation can deliver 30 per cent increases in productivity.

Annual Savings per employee: *$21,600*

Eliminates – redundant and careless data entry
Gaining ten (10) minutes of daily personal productivity for a sales professional earning $35 an hour, results in a savings of $1,517 per year (1 year = 260 working days). [calc: $35hr / 6 x 260days]

Annual Savings per employee: $1,517

Paperless – unburden staff from unnecessary paperwork
Gaining ten (10) minutes of personal productivity per day, results in a savings of $1,517 per year.

Annual Savings per employee: $1,517

Improves – utilization and productivity of field personnel
TeamSFA enables instant and immediate access to accurate customer contact information, at your fingertips, is certain to boost the productivity of your mobile sales professionals. Studies have shown that for every phone inquiry made to office administration, there is a real cost of between $7-15 per call. Saving a single call per day, results in an annual savings of $3,900.

Eliminating 1 call/day = Annual Savings: $3,900

Cutting costs by automating existing processes
TeamSFA provides a definite reduction in operating costs and savings from automating existing business processes, eliminating manual paper-based processes and having your field sales professionals access and update data with remote application accessibility.

IDC contends that it costs between $7-15 per phone call for a remote mobile worker to make an inquiry with office administration.
Eliminating 1 call/day = Annual Savings: $3,900

Eliminates – redundant and careless data entry
Improved operational efficiencies can reduce your office administration head count. Savings can exceed $40,000 per employee. Or otherwise, free and enable staff to attend other tasks and minimize the pressures of increasing staff.

Annual Savings: $40,000

Paperless – unburden staff from unnecessary paperwork
Reducing 'paper processing'– and elimination of redundant data entry will have a dramatic impact on office administration. Paper based processing often requires redundant data, such as the customer's address, contact information and billing account. This data may need to be available on multiple forms and may require multiple data entry points. Automating these processes with an electronic system, can eliminate several redundant steps. Sales activity tracking and audit trails are dramatically simplified with a fully electronic system. This can result in 30 minutes per day of regained productivity. [calc: $35 / 2 x 260]

Annual Savings per employee: $4,550

Integrates – information seamlessly with existing back office systems
Integration with existing systems is a critical component for automating the mobile worker ecosystem. Integration ensures that the new mobile solution allows sales management and office personnel to maintain existing business processes and ensures your accounting solution as the heart beat of your business control. Integration completely eliminates the hand-off of information and failure points between technologies. Changes, modifications, and new information from your accounting system is immediately made available to your mobile sales professionals with TeamSFA. This provides a more informed work force, and office administration staff can regain several hours of productive time per week. [calc: 2 hours/week = $70 x 52 weeks]

Annual Savings per employee: $3,640

Eliminates – printing and distribution costs
TeamSFA eliminates the dependency to publish and distribute paper price schedules. This has an immediate savings, which can be very substantial as price schedules often contain errors and omissions which require republishing and redistribution expense. [calc: 4 printings x $1,000 publication]

Annual Savings: $4,000

Improved revenue generation

Revenue generation is the life blood of any business – large or small. This can take on the form of retaining existing customers, finding new customers, delivering new services, and selling more. Sales Professionals clearly play a pivotal roll in your revenue generation success or failure. The following demonstrates some of the key areas where Mobile Sales Automation impacts a company's top line.

Paperless Integration – automated billing integration

Mobile sales Order automation can offer a dramatic improvement to cash flow – due to faster, often same-day billing. An improvement of 10% in cash flow will have a dramatic impact to any business through fast and timely invoicing which guarantees less customer discrepancies, resulting in improved receivables and collection challenges.

Decreases – response times

For today's mobile workers, quick, easy access to reliable information sources is essential. Even a minor improvement in accuracy or timing can make the difference between winning a customer's business and losing it to a more agile competitor. Good service is the golden key to customer loyalty. It is a proven fact that it costs 10 times more to find a new customer, as compared to keeping an existing customer.

Delivers – actionable time critical information to mobile teams

TeamSFA enables notification to the field sales professional of all client activity occurring within their sales territory. This enables sales professionals to have a constant pulse on their assigned territories and customer relationships. This can have a dramatic impact on productivity, allowing reps to focus on sales generation without worrying about sales tracking and inquiring about business that has already closed.

Improves – utilization of field personnel

Access to available inventory and slow moving inventory can be the determining factor in receiving or not receiving an order. This knowledge can further enable proactive sales efforts to promote clearance of these items from inventory, having a dramatic impact on a businesses cash flow.

Delivers – transaction to customer

TeamSFA enables a sales professional to deliver sales quotations and order confirmations to their customers by; email, fax or paper print with the tap of a button. This can have a dramatic improvement in sales productivity, while providing a new level of customer service, generating new revenue activity and opportunities.

Building competitive advantage

According to the forecast, business looks good. The weekly billing, however, tells a different story. Revenues are off by 20%. The executives will see an adjustment in the forecast eventually, but by then it might be too late to have an impact.

Companies have been investing in technology automation for decades. Successful organizations are able to leverage computerization and automation into competitive advantage. However, for most companies, the final mile of automation has often been the last to receive automation – the sales professional. Automating where the work is performed, at the job site, with the customer, offers the greatest cost savings and differentiated value-add, which translates directly into sustainable competitive advantage for your business.

Business leaders have hired line of business managers to be responsible for cost control, cost containment, business administration and revenue. The primary role of many CxO leaders today is ensuring the business' sustainability and share holder value.

The following provides examples of the many competitive benefits of Mobile Sales Automation:

Transforms – existing systems into key competitive differentiator
Automation can provide your sales team with more time to consult and interact with your customers.

Conforms – to your business processes
Mobile technology should enhance, not redefine your business expertise and processes. TeamSFA is an extension of these systems, automating this workflow and sharing common business critical data from your existing back office systems with your sales professionals.

Integrates – information from multiple systems
Business Intelligence is key to being able to react quickly. Integrated systems are the key to this success.

Streamlines – communication among sales managers, reps and customers
Timely and accurate closed loop collaboration with customers will enable competitive advantage, retain customer loyalty and earn new customers.

Deploys – in 30 days or less
Recognize immediate ROI with immediate business benefits.

Improves – utilization and productivity of operational management
Automation can enable operational management to focus on customer satisfaction requirements and revenue generation activities, versus crisis management. This can have a dramatic impact to your staff assignments and competitive advantage.

It is difficult to generically quantify the dollar value of each of these competitive differentiators. Yet, there is obvious business benefit that can be associated with each of the above for any product selling organization.

ROI Calculation

As discussed, the four goals that are the most common drivers for mobile workforce automation are:

- ⊃ Boosting mobile worker productivity
- ⊃ Cutting costs by automating existing processes
- ⊃ Improving revenue generation
- ⊃ Building competitive advantage

Annual Savings

Two hours of personal productivity gain per week	**$3,640**
Research contends that field force automation can delivery 30% increases in productivity	**$21,600**
Achieving 1 incremental sales call per day	**$9,100**

First Year Costs for a 10 User Subscription

	One-Time	Unit	Monthly	Annual Total
TeamSFA (10 user) Subscription			$25/User	3,000.00
TeamSFA Setup	1,000.00			1,000.00
Handheld Computer		300.00		3,000.00
Wireless Voice*			N/A	N/A
Wireless Data			40.00	4,800.00
	1,000.00			**11,800.00**

*Cellular voice is a current and existing expense which should not impact the SwissMobile Sales Automation ROI calculation.

Return on Investment

- ⊃ **The TeamSFA solution will pay for itself in the first year based on 8 minutes of increased productivity per day.**

- ⊃ **Achieving 2 hours of increased productivity per week, garners an ROI inside of 2 months.**

- ⊃ **Achieving $5/day increase in Profits achieves an ROI inside the first year.**