



Two years ago, I was recruiting a new executive level sales and service manager for our consulting business. The candidate was an ideal fit for our company but she was concerned about taking the job for one reason.

“I spend six weeks in Europe every year and I’m unwilling to give that up,” she told me apologetically. “I can’t imagine that will work for someone with a sales role in a growing business whose primary market is North America.” Ten years ago, she would have been right.

This extract on “Mobility” is from the 21st Century Sales Warrior guide, a collection of thought leadership insights written and assembled by [Paul Greenberg](#), the well-known authority, visionary and enthusiast of all things related to CRM and the best-selling author of [CRM at the Speed of Light: Social CRM Strategies, Tools, and Techniques for Engaging Your Customers](#). This particular extract was written by Anneke Seley.

Mobility not only gives sales people a new way of working; mobility also gives customers benefits.

Today, thanks to tablets, smart phones and the files and applications that can be accessed on them, it wasn’t a problem. The growth and adoption of mobile devices and applications gives us freedom and flexibility to work on our own terms.

This is especially true for sales people, who are among the workers that have traditionally needed to be on the go more than their colleagues in other business roles. Mobility gives us new ways to communicate with customers, with other sales team members, partners and support staff with more timely and relevant information.

Mobility not only gives sales people a new way of working; mobility also gives customers benefits. They can now connect to us without worrying about where we are, what time zone we’re in, or if we’re at the office...if we even have an office to go to. Because of this, Mobility is one of the drivers of the phenomenon known as “Sales 2.0”, a better way of selling that is oriented to how customers are now buying while improving sales measurement, predictability and results. Simply put, Sales 2.0 makes selling more efficient and effective for both buyer and seller, made possible by technology.



Sales leaders, many of whom first started using mobile devices in their personal lives, are naturally gravitating to using them in business, given the growing number of tools and applications now available and optimized on mobile platforms. When the iPad first came out, Rick O'Rourke, a seasoned technology sales leader and Vice President of Strategic Agreements for SAP EMEA, bought one because he thought it would be a cool device on which to watch movies on airplanes. To say Rick travels a lot is an understatement. He is out of his office in Paris most of the time. In the first three months of this year, he visited 25 countries. Rick is an American who has been living in Europe (and airplanes!) for the last year and a half. His role is to manage the large deal team, grow and secure the most strategic transactions in his territory, which spans Europe, the Middle East and Africa.

Rick's perception of mobile devices shifted – from fun entertainment providers to business productivity accelerators - when he saw what happened when his company gave out tablet devices to top executives, loaded with the tools used by sales leaders every day - business analytics, pipeline and forecast systems, e-mail, calendar, presentation, spreadsheet and word processing applications. The management team was hooked and quickly authorized IT to issue tablets to every field sales employee at SAP. Rick quickly realized his company was taking advantage of a serious sales productivity trend.

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Rick says mobile devices have made him much more efficient personally- he especially appreciates the iPad's "instant on" – no waiting for booting up or connecting to a VPN (Virtual Private Network.) His suitcase is a lot lighter now, too. For most trips, he can now leave his laptop at home, which has reduced the weight of his briefcase about 70%. He can do the work he needs to do – mostly web conference calls, scheduling, presentation and document review in addition to pipeline and forecast review in his CRM (Customer Relationship Management) system - on his tablet and smartphone. Now when he is called upon to give a presentation in one of the many SAP offices or customer sites around the world, he simply uses an adaptor to connect his tablet to a projector. And given how much he travels, he's looking into another timesaver: an internal application that allows him to take pictures of his expense receipts with his smartphone and automatically upload them into his company's expense application.



Tablets have also changed the way his sales team demonstrates their products to customers, too.

Industry and opportunity specific demos are available on the iPad as well as on the fly, immediately available, current data – not information that is two days old. These capabilities mean something to customers, some of whom can see real-time data for the first time or visualize exactly how products would work in their company, whether they are in Utilities, outfitting a field service team or in Financial Services, presenting financial data to customers at a lunch meeting. Sales reps using mobile devices can now easily access, enter and update customer information and opportunities on the CRM application that runs on the iPad at the moment that it's needed and relevant.



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Other forward-thinking sales executives are taking advantage of what mobility has to offer to their sales teams and their customers. Corporate Visions Inc.'s VP of Sales, Kevin Guthrie views his job as removing obstacles and making selling easier for his team. Mobility plays a role in his approach to improving sales productivity and effectiveness. He says his reps check their smartphones before customer meetings to review information to make their sales meetings more effective. That's important because he's using his own product - his company provides sales messaging, training and tools (including mobile versions) to help sales people be more relevant to customers.



Dave Keller, Director of Sales at Google, also uses his own products to increase sales productivity. He couldn't imagine staying on the same page with his team without the cloud-based applications they use to collaborate and the e-mail and calendar functions that connect them, both internally and to customers, using any device, anywhere. The traditional approach to scheduling meetings – by e-mailing suggested times back and forth – can really lengthen a sales cycle, a deal-killer when customers are waiting for responses and evaluating competitors.

Research confirms that mobility improves sales performance, too. A late 2010 report, *Sales Mobility: Quotas Untethered*, by Aberdeen Group's Research Director for Sales Effectiveness, Peter Ostrow shows that in over 250 organizations surveyed, organizations using sales mobility tools had measurable performance advantages including:

5.2%

AVERAGE YEAR-OVER-YEAR INCREASE

In customer retention rate compared to 1.5% decrease for other companies

3.3%

AVERAGE YEAR-OVER-YEAR INCREASE

In average deal size or company value; compared to a 1.1% decrease for other companies

An earlier Aberdeen report by Ostrow revealed that mobile CRM access has been proven to increase team attainment of quota by 25%

(Source: Aberdeen Group, Sales Intelligence: Preparing for Smarter Selling, February 2010)



Sales mobility is typically associated with on-the-go field reps, who spend a majority of their time in front of customers – or traveling to see them. But mobility has a place in inside sales, too. Shelley McNary, Sr. Director, Inside Sales at Coveo, is taking a whole new approach to recruiting her reps because of mobile phones and technology.

Mobility has a place in inside sales.

She is no longer restricted to hiring team members that live close to her corporate headquarters in the Bay Area. She can now pull from a highly qualified nationwide candidate pool working from home offices or their favorite internet-enabled hangout. Smartphones make her sales reps more easily accessible to prospects as well as to herself, their manager. Metrics, processes and systems are used consistently across Shelley's organization and performance expectations are clear, so it doesn't matter that the team is not under her nose. Shelley's current team includes inside sales reps in Atlanta, Jacksonville, Indianapolis and Phoenix. She reports that her ramp time for new reps is now 50% shorter due to her ability to access the best candidates, regardless of their location. And her team, which is measured on passing accepted sales opportunities to the field as well as the progression of these opportunities into the pipeline, is ahead of their year-to-date goal. Even "inside sales" doesn't have to be "inside," thanks to mobility devices and applications.

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