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HOW TO MAKE YOUR ROAD WARRIORS MORE PRODUCTIVE

WITH A COMPLETE CUSTOMER CASE STUDY



Introduction

THE MOBILE SALES TEAM

“The most dangerous place to make a decision is in the office. You need to make the decision where the customer is.”

–Ulrik Nehammer, CEO, Coca-Cola Germany

As competition in your industry increases, it is more important than ever for your sales team to be performing at 100%. Salespeople should show up to every call with all the pieces in place to close the sale, every time. Gone are the days of “I will email you the details tomorrow.” You need to have all the information in the moment, the means to connect to your team on the fly, and a tool that is both easy to use and consistent across platforms.

Having your sales team equipped with a mobile CRM not only offers a degree of flexibility and efficiency for the individual sales rep, but it is also a proven way to boost sales, increase productivity, and company revenue. This e-book will show you exactly how a mobile CRM can make your road warriors more productive in the following ways:

- Access to the right information
- Teamwork makes selling easier
- Ease of use

Let's take a look at how a mobile CRM can revolutionize your business.

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Chapter 1

THE RIGHT INFO AT THE RIGHT TIME

A mobile workforce must be able to access all the important and relevant information they may need for a meeting, right when they need it. Whether you are looking for a refresher on your prospect's most recent account activity, support cases, or purchase history, or you want to arm yourself with all the latest product and pricing information, a mobile CRM solution can help you do it in the moment or even onsite at your next meeting. It's like having a virtual cross functional team that is always with you, ready to brief you on all the information you need to know.

Not too long ago, being away from your computer meant you were only armed with what you were able to cram into your bag or briefcase. Now, with a mobile CRM solution, you can access all your customer and company data at any time, allowing you to keep in touch with more prospects and collect new and relevant information as it comes in. Being able to update your CRM on





location and in real time turns what was once a tedious chore at the end of the day (or even worse leaving it to the end of the week or month), into a simple process that ensures you always have the most current information at hand. Access to this information provides sales reps with a number of advantages.

Improve Insights

The amount of available data about a sales lead has grown tremendously in the past few years. A prospect is no longer just a name and a phone number on a card in your Rolodex; she is a collection of online tracking data, social profiles, company information, account history, and much more. All of this data gives sales

reps an exciting opportunity to provide a more personalized sales process than ever before. However, all that data does little good if you are unable to access the meaningful information that you need the most.

Mobile sales teams have robust profiles for all their prospects, compiled from dozens of sources, and distilled into one cohesive view that puts the most important and relevant information front and center. Today, for the first time, sales reps have a complete 360-degree view of the customer.

The advantages of data-rich selling cut both ways. Mobile sales teams can also turn

the magnifying glass back on themselves and use improved tracking metrics to gain a better understanding of their sales performance. With this new insight, managers can provide valuable coaching in real time, not just once or twice a quarter.

Put Data to Work

Analytics and reporting have long been the domain of IT or specialized data teams, viewed as far too complex to be used by the average sales professional. But as the amount of accessible data has skyrocketed, reporting has become too valuable a tool to hide away in a back office. Salesforce brings reporting and dashboards to the people that really need it: sales managers and their teams.

With no IT or analytics experience required, Salesforce reports and dashboards make finding the right data to make actionable decisions a matter of a few taps or clicks. To be truly actionable, the right data also must be applied to the right context. With mobile functionality, Salesforce reports and dashboards are accessible from the palm of your hand, anywhere you need it. With so much data available to sales professionals, the problem is no longer merely obtaining data, but sorting through massive data sets to find the insights you really need. Salesforce makes this easy with robust filtering options and a visual interface that helps identify patterns and insights.

It is not just about your existing customer data. In addition, with prospect tracking, you'll never have to wonder what your prospects are up to as well. You can automatically track the pages they visit on your site and set notifications that let you know when they take purchase-ready actions like viewing your pricing page with easy integration with marketing automation tools.

Everything at your fingertips:

- **Lead Records.** Access your entire database of prospects on the go, including all the details and information already available in your database.
- **Activity Tracking.** Always be in the loop with your prospects with easy access to their most recent activity and real-time alerts for customer queries or purchasing behavior.
- **Analytics.** Understand exactly how you are performing with a comprehensive view of your key metrics and get immediate, tailored feedback from your manager.

Have the Right Apps

Sales is not an easy job. It takes a special personality to juggle dozens of accounts, manage countless meetings, and respond to dozens of follow-up emails and tasks every day. You'd be hard-pressed to find a company employee with more on his plate than the average sales rep.

With so many appointments and responsibilities to handle, sales professionals deserve their own personal assistants. They need somebody to keep all of their accounts, tasks, and appointments organized so they can focus on what they were hired to do: sell. Unfortunately, a personal assistant for every sales rep just isn't in the cards for most companies.

However, Salesforce has changed that. With a suite of productivity apps that helps you organize your days, automate repetitive tasks, and move at the speed of business, Salesforce allows you to focus on what matters most: the customer.

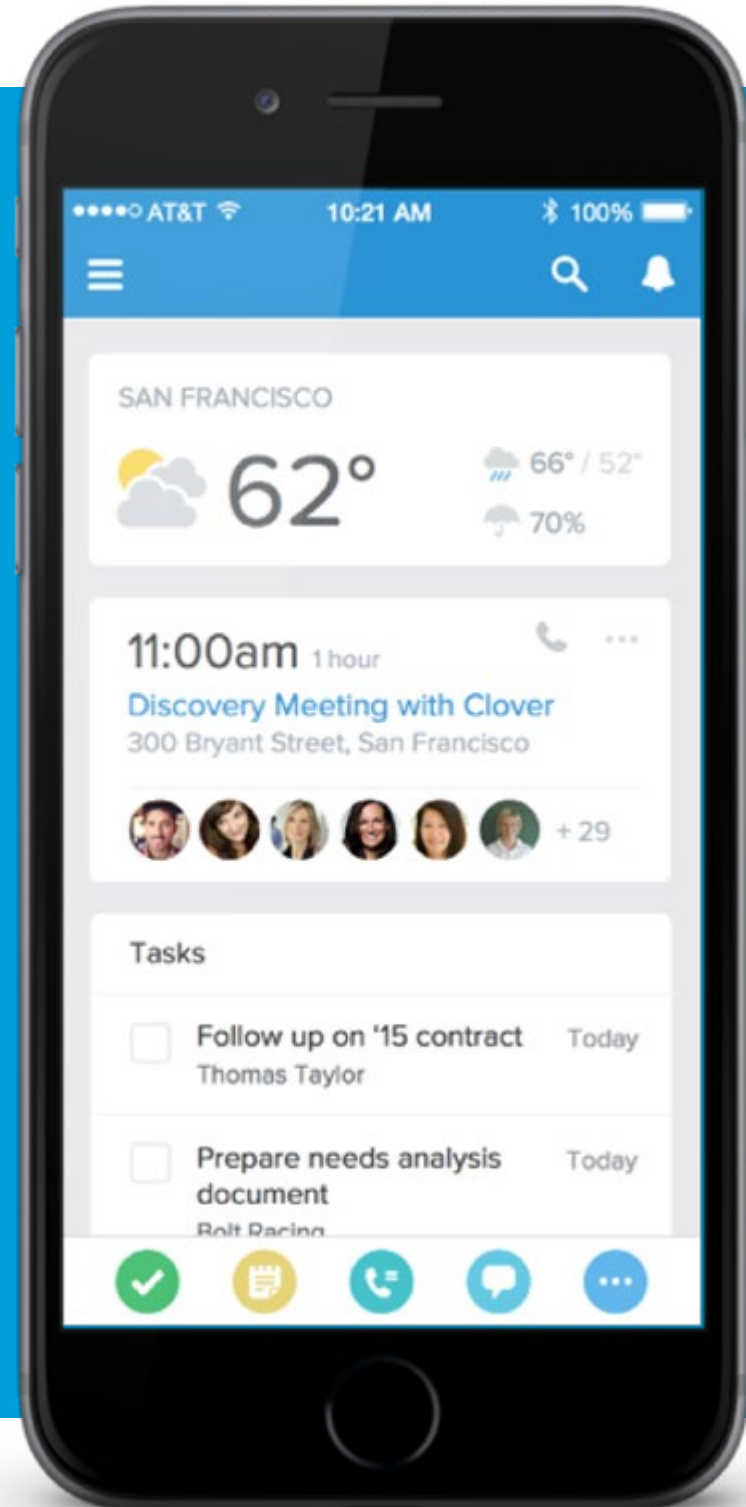


YOUR SCHEDULE

Getting a complete view of your day often requires visiting multiple apps. You need to visit your calendar app to see the day's appointments, your to-do list for daily tasks, etc. The Today App in Salesforce1 brings all of this into one location so you can get a complete briefing on your day at a glance.

AND EVERYTHING ELSE

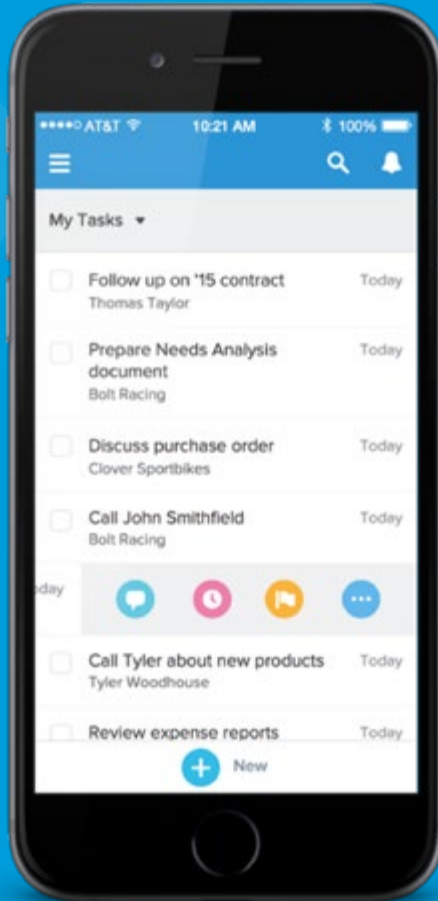
In addition to your daily schedule, the new Today App provides everything else you might need for a productive day. From the day's weather forecast to news alerts for any breaking news around your accounts, Today keeps you up-to-date and informed. The Today App even gives you a daily status update on your progress toward quota.



PRODUCTIVITY APPS



Tasks

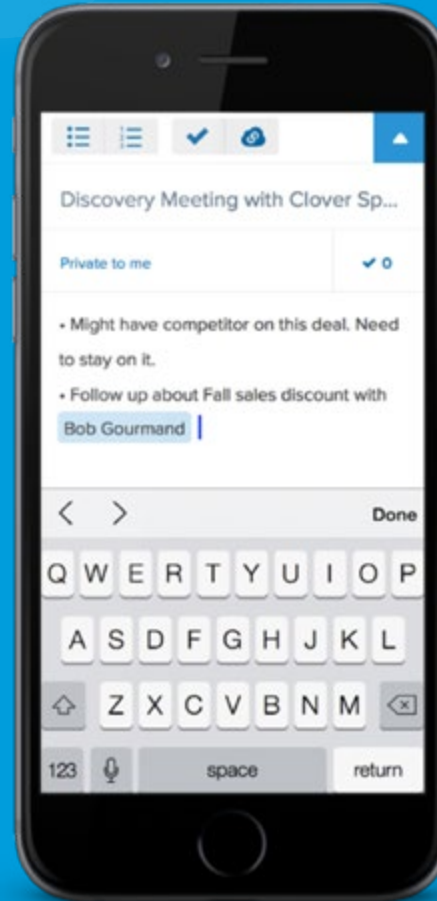


TASKS

Create tasks and receive alerts on the go with the redesigned Tasks App.



Notes

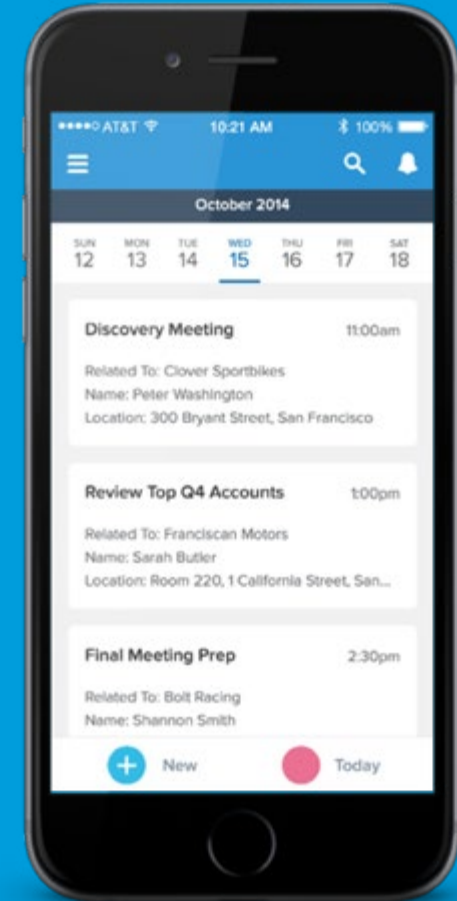


NOTES

Meeting notes are most effective when the information is still fresh. Start making them right on your phone.



Events



EVENTS

Sales reps need a calendar app that keeps them organized, and the new Events App delivers.

Chapter 2

TEAMWORK MAKES SELLING EASIER

Assuming you will have multiple team members handling customer engagements and working deals, a mobile CRM solution is the perfect platform to allow your team to collaborate. Salespeople can use the mobile solution to ask questions, give advice, request resources, and give updates. These interactions bring your team closer together and make them more efficient.

This collaboration allows your reps to tap into their team and network for advice, information, and expertise on the fly. Modern sales teams are more collaborative, with a team atmosphere that allows them to leverage their collective knowledge to outperform salespeople that are less connected.

Break Down Silos

The lone-wolf salesperson is quickly becoming an endangered species. Sales organizations are slowly realizing that their productivity is far greater when they work together instead of in isolation. However, most CRM tools are not designed to accommodate this new era of social collaboration.

Salesforce was designed with social collaboration at its core, breaking down silos with the enterprise social networking



capabilities of Chatter. Salespeople can crowdsource advice from their peers in seconds or get answers to even the most technical product questions from the product team, even if they are halfway around the world. Two heads are better than one. Imagine what the collective intelligence of your entire organization could accomplish.

Access to All Your Resources

Mobile CRM apps allow sales reps to access files and pitch decks on the go. Greater flexibility to tweak presentations on the fly means a more personalized experience for each prospect. It also makes sharing files between team members fast and easy with a simple tap or swipe of a screen.

As content marketing becomes a more central part of the customer experience, reps who have access to content assets like white papers, e-books, and guides at the moment their customers need them can establish themselves as valuable resources to their prospects.

Optimize Lead Flow

With a well-organized lead-generating machine, companies need to develop workflows to manage the diverse new influx of sale opportunities. Without a system in place to manage all these leads, a sales team can be thrown into chaos.

This is where a mobile CRM solution like Salesforce can help. With marketing automation technology to handle much of the grunt work, and organizational tools to keep everything neat and orderly, a company can harness its inflow of leads to start driving business results.

Before a lead even makes it to a salesperson, they can be automatically scored and graded by how well they fit your ideal lead profile. Bad leads can be added to lead-nurturing journeys, while good leads can be routed to the appropriate salesperson based on location, industry, or business type.

Selling is easier as a team:

- **Solo selling.** A single sales rep is limited to their own instincts and resources. While an experienced sales rep can use their instincts to close deals on occasion, they have no safety net to fall back on if they need more information or lack expertise in a certain area.
- **Team selling.** With internal social networks, collaborative teams can easily aggregate skills, insight, and expertise to close more deals and identify new opportunities. This type of collaboration can increase cross-selling, decrease sales cycle times, and bump up conversion rates.

Chapter 3

EASY TO USE

Above all, mobile sales teams will find their daily functions easier to perform, and with greater efficiency. Sales reps already have their phone in hand for hours each day. Putting your CRM at their fingertips, in a way that matches the way they want to work, eliminates much of the friction and monotony in utilizing the most important CRM features. Removing these barriers allows your sales team to fully tap into everything your CRM has to offer.

To maximize productivity, the CRM experience needs to be seamless across platforms and across devices. Sales professionals don't have time to learn to navigate their CRM all over again on every device. The user experience needs to be intuitive and straightforward, surfacing the information a rep needs the most and filing away the rest. The best CRM solutions are the ones that deliver this seamless user experience and ease of use.

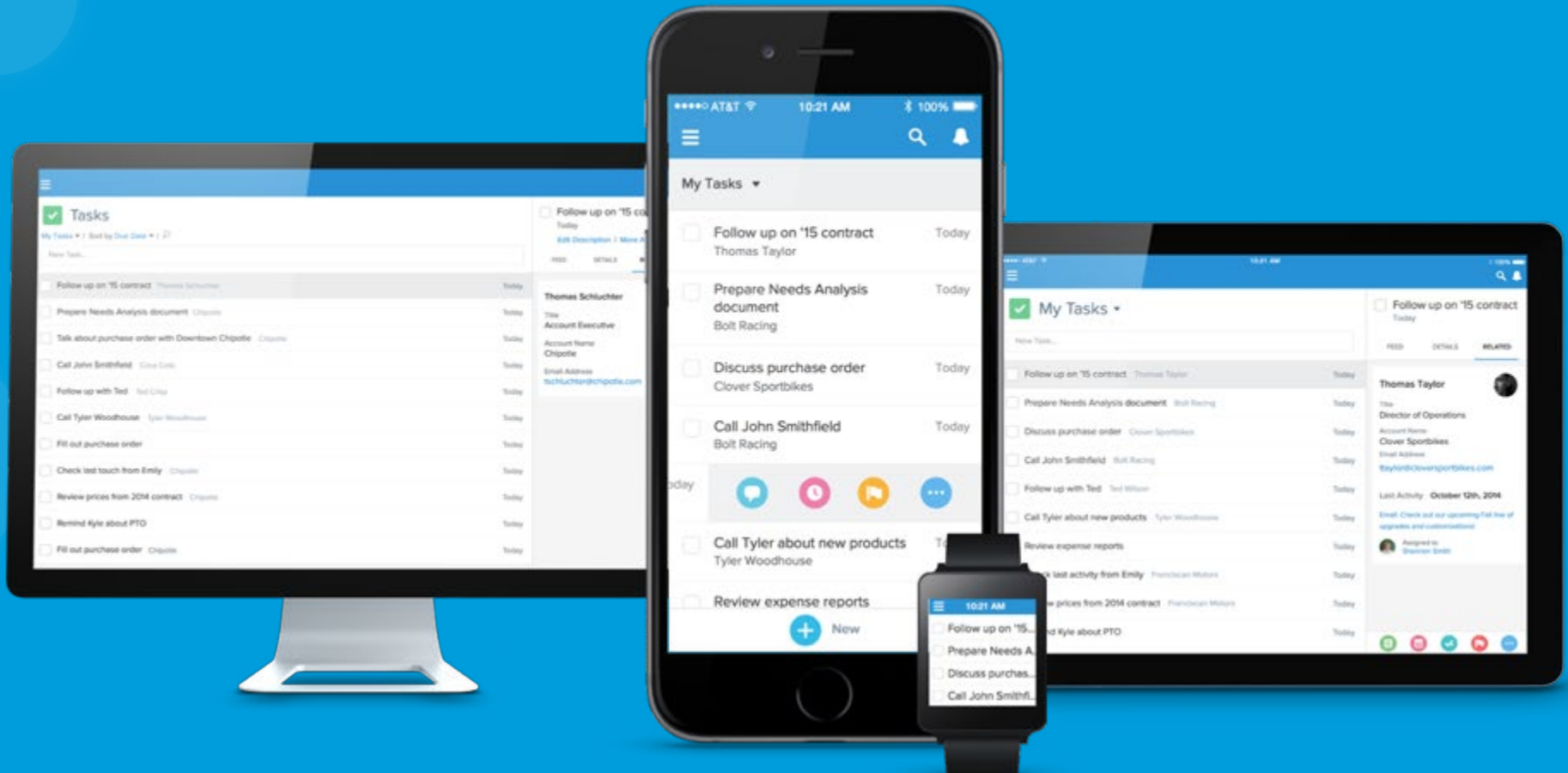


Responsive Design

You are no longer confined to your desktop computer for work. Today's workforce is on multiple devices, and always connected. The tools you use most should work the same across all of your devices and feel like a consistent experience on every screen. With Salesforce's responsive design, you now get the same experience no matter where you are or what device you are using.

Usability

Today's workforce has access to dozens of tools to solve their business problems and enhance their productivity. But more tools doesn't always equal higher productivity; often, they wind up fracturing our attention and ultimately making us less productive. However, that all changes with the consistent user experience of the new Sales Cloud.



Chapter 4:

Newell Rubbermaid

Newell Rubbermaid is a company you likely come across every single day. With nearly \$6 billion in sales, they have leading brands in five business segments including Writing, Tools, Commercial Products, Home Solutions and Baby & Parenting. Newell Rubbermaid successfully updated the 112-year-old company's operations, with the support of Salesforce.



Started in 1903 in Ogdensburg, New York, and headquartered in Atlanta, Georgia, the company has a long history of providing industry leading consumer and commercial products. However, in the past two years, after more than 110 years of operation, the company has undergone a transformation as part of its Growth Game Plan strategy.

With approximately 17,000 employees, Newell Rubbermaid has transformed from a holding company to an operating

company. It has also moved from 13 autonomous business units to one centralized operating model. With its mission of making the company the partner of choice for growth to its customers, Newell Rubbermaid began looking for a way to align its North America field sales team with the new operating model and maximize productivity.

The company sought to empower its field teams in the following areas:

1. Strengthen pipeline management process
2. Improve impact of supporting “Sell-through”
3. Prioritize business objectives
4. Streamline new hire & territory changes
5. Simplify activity reporting
6. Increase management visibility to key activity
7. Improve business resource alignment
8. Be “Easier to sell for” & “Easier to buy from”

Newell Rubbermaid found solutions with the following Salesforce and Salesforce1 Mobile App features:

1. Opportunity management & account data
2. Utilization of reporting capabilities
3. Sell-in results & stage length reports
4. Account, contact, notes, and opportunities
5. One input = many records
6. “Big Deal” alerting
7. Chatter/ Risk & Opportunities/ Capacity request
8. Combined total experience

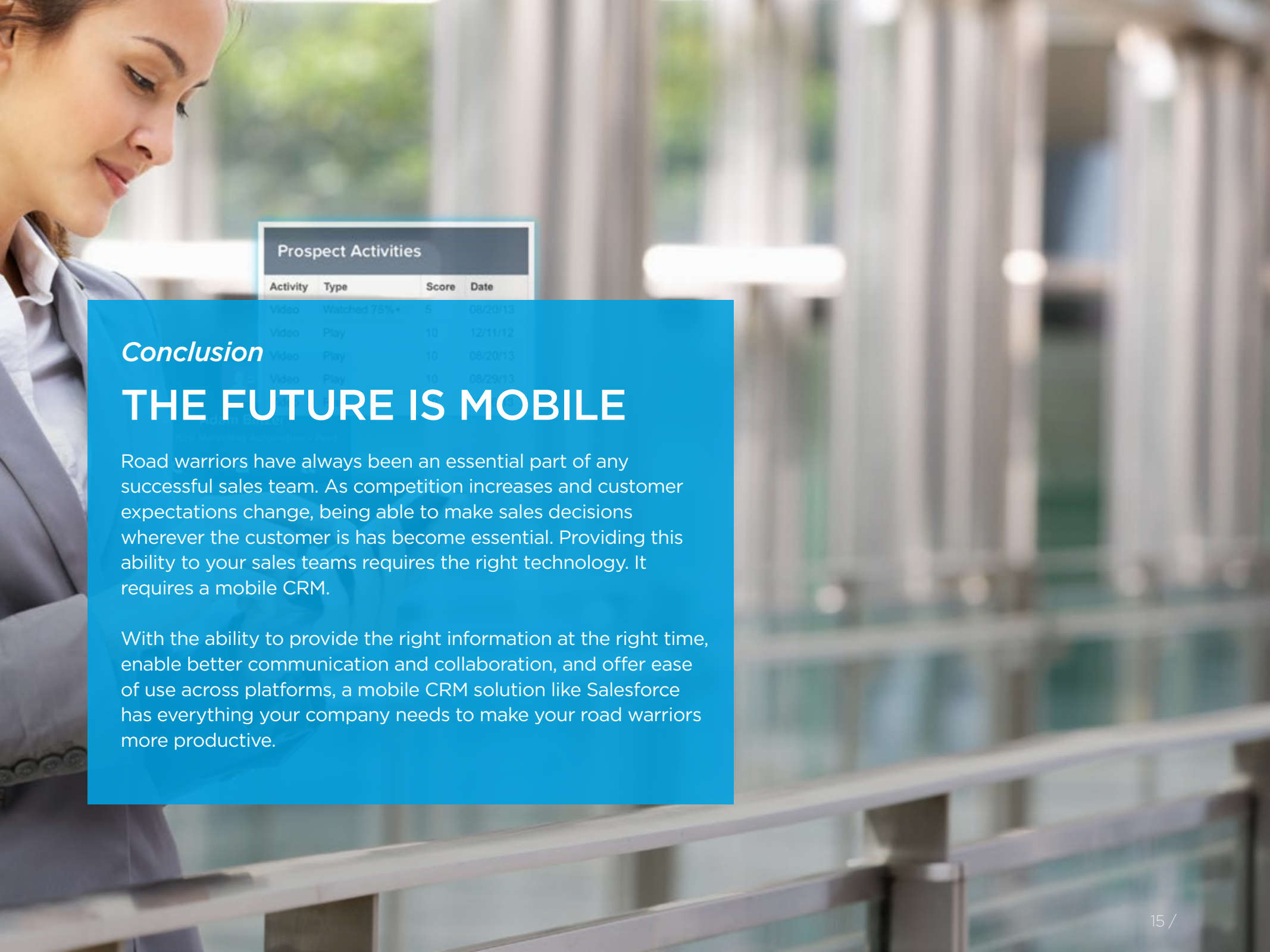
The Results

With the Salesforce1 Mobile App, Newell Rubbermaid created an informed view of what was working in its sales process and opportunities for early engagement. Newell Rubbermaid now provides proactive notification to leadership for early engagement. Sales managers are also given insight into opportunity aging as well as notifications of big deals.

Newell Rubbermaid continues to leverage tools to further streamline and succeed. The Salesforce1 Mobile App makes conversations for collaboration and coaching much easier. Data entry and invoicing processes are also accelerated as sales reps were now able to work directly from their phones, while still in a client meeting.

Newell Rubbermaid is seeing gains in the following areas:

- Continued positive dialogue with customers
- Better-focused conversations with management/ leadership
- Increased focus on priorities
- Increased efficiency and time savings
- Enhanced internal reporting
- Improved strategic sales process



Prospect Activities

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Video	Watched 75%+	5	08/20/13
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Video	Play	10	08/29/13

Conclusion

THE FUTURE IS MOBILE

Road warriors have always been an essential part of any successful sales team. As competition increases and customer expectations change, being able to make sales decisions wherever the customer is has become essential. Providing this ability to your sales teams requires the right technology. It requires a mobile CRM.

With the ability to provide the right information at the right time, enable better communication and collaboration, and offer ease of use across platforms, a mobile CRM solution like Salesforce has everything your company needs to make your road warriors more productive.

SALES SOLUTIONS THAT WILL MAKE YOUR BUSINESS MORE PRODUCTIVE

If you want to grow your sales and establish a transparent sales process, you need an easy-to-use Customer Relationship Management system. Salesforce allows you to store customer and prospect contact information, accounts, leads, and sales opportunities in one central location.

32% Improvement in win rate.

40% Increased sales productivity.

32% Increase in sales revenue.



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