



## Are you the trapped mammoth or the hunter?

BUYING MOBILE CRM



*So, you think installing mobile CRM will give you a head start on your competition? Carefully choosing a package, installing it, training people and done. But then, it doesn't appear to be all that easy. You start to feel like you're doing it all wrong. You might even start to identify with the good-hearted and oblivious mammoth who is about to take a wrong step and get himself irrevocably stuck.*

*Without trying to scare you: that first wrong step does in fact exist. The major pitfall is real. But don't worry, you don't have to be the mammoth who falls into it.*

### WHAT DO YOU REALLY WANT?

Because what is it that you want? A mobile CRM that is easy to work with, obviously. But the actual goal is more sales! You want to be closer to your clients, know and serve them better. With decisions based on relevant and real time data. That's why you want mobile CRM. The biggest pitfall is clearly considering mobile CRM to be a tool, a layer that covers the 'actual' CRM. Mobile CRM is not part of a strategy, mobile CRM is a strategy.

### FUTURE-PROOF TECHNOLOGY WORKABLE OFFLINE

There you go, we took the first step. Considering this new point of view, we will now go over a manual of 10 steps. First, we'd like to point your attention to two technical giveaways. Two open doors, so to speak:

- **Mobile really needs to be mobile:** the solution has to work under all circumstances and in all places – even without an internet connection – thanks to a local partial copy. It also has to provide users with synchronized multi-access, so they can “overwrite” each other and data is deleted. This seems evident, but it really isn't. Just try and ask for convincing evidence.
- The technology you use to build a mobile strategy should be **future-proof**. This means: without unpredictable update and upgrade costs, user-friendly and applicable to all operating systems and devices. And of course, long-term availability, secured by durable technology.

## THE 10 STEPS

1) **Maximal face time.** Create a vision that puts customer satisfaction at the center, since this is crucial for the entire company's success. Design your Customer Relationship Management in such a way that there is loads of time, preferably face to face, to interact with your customer. Consequently, your future mobile CRM is much more than just a layer on top of existing systems.

2) **Task force.** Put together a strong Task Force to create the ideal CRM. The Task Force will be adapted and expanded according to future points of attention. This will happen organically and will require some flexibility.

3) **Business process mapping.** Evaluate concrete steps in your process towards higher customer satisfaction. Who is responsible for which part of the process? Only focus on functional requirements, not on the available building parts, and then let technology follow. Every step requires support and logging of the CRM. This support should be optimal in the mobile part.

4) **Communication flows.** Determine the ideal information flow. Who has to communicate with who? How are tasks being passed on, how do you report? What can be automatized in order for information to reach relevant levels as quickly as possible? CRM and mobile CRM should promote the independence – the empowerment, so you will – of all employees.

5) **Business Intelligence.** Determine which data and insights you need for the whole of the CRM. Then, deduce the mobile set of data and insights that has to be available in the field. This way, your information will always be consistent. You can distillate insights from data even quicker with artificial intelligence. Any self-respecting CRM has AI support.

6) **Wish list.** Check whether or not you have identified all important factors in making your choice for a particular CRM system. Considering the previous steps, you should be able to make a list of minimal requirements for a well-informed decision. We'll let you decide.

7) **Consult references.** Don't go on an endless search for demos and meetings. A targeted questioning of organizations who use CRM is more efficient. Contact organizations that work with mobile CRM, preferably in the same industry as you.

8) **ROI.** Identify the possible added value – more sales, more efficiency – and quantify it. Then determine your desired ROI and payback. Afterwards, you can decide on your budget.

9) **Chemistry with the partner.** Value this aspect. It is more than merely subjective. You will collaborate with a CRM specialist for a long period of time: they have to show the necessary flexibility with regards to modifications, maintenance, training new people... On top of that, they have to think in terms of your business. References and personal contact will make the difference.

10) **Get ahead.** Good CRM by definition is mobile and gives your enterprise the capacity to go along with new circumstances and trends. Hold on to that head start. Guard the functioning of mobile CRM as a vital part of your company. A partner who offers maximal support on this part is a great asset.

At this point, you'll probably identify much less with the unknowing mammoth who is being cornered by experienced hunters. However, it goes without saying that you don't have to agree with us. But if we have sparked your interest or curiosity, don't hesitate to contact us. Our CRM solutions have a set of qualities that will further strengthen your leading position because they're built on the leading technology of Microsoft Dynamics 365 and Resco Mobile CRM.



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