



Making every minute count for mobile sales and field service teams

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Overview: Driving business productivity and customer satisfaction with mobile technologies

An increasing number of companies rely on mobile employees to build close relationships with their customers and partners, accelerate revenue, and extend marketing efforts well beyond the four walls of their traditional office environment.

By 2008, there will be close to 103 million mobile employees in the U.S. and an estimated 878 million worldwide, according to market researchers In-Stat and International Data Corp. (IDC) (see Figure 1). The majority of U.S. companies (71% according to the BPM Forum) also plan to expand their mobile workforce in an effort to improve communications and interactions with customers and to be more competitively positioned.¹

Wireless devices will play a key role in enabling mobile employees to easily connect with people and resources, exchange vital product and customer intelligence, and share information with other mobile employees. These devices include voice- and data-capable smartphones that can be used for conventional cellular telephone communications, but can also extend deskbound and office server applications into the field.

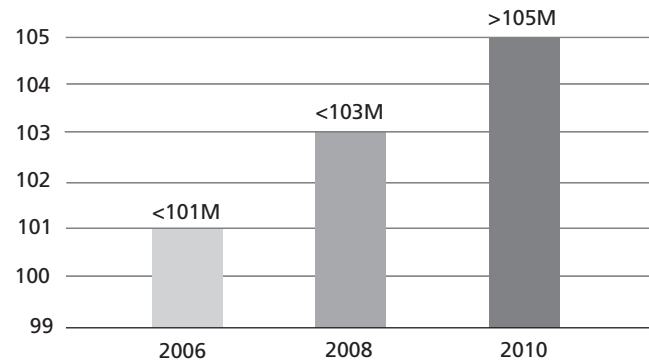
In doing so, these small and highly flexible systems help speed up responses to emails and customer queries, increase the productivity of mobile employees, and accelerate customers' purchase decisions.

Mobile enablers such as the Palm® Treo™ smartphone allow employees in the field to take a more *proactive* role in a company's overall operations and successes by facilitating the "Three C's" of a successful mobile initiative: Communications, Collaboration and Coordination.

This is good news for managers who track and manage field personnel and mobile devices, and even better news for sales and field force teams who now have access to more up-to-date information for their customers.

This white paper will address some of the current challenges facing sales and field services employees and how wireless-enabled tools like the Palm Treo smartphone are used to effectively meet the needs of mobile employees across industries. It will also explore ways that smartphones drive revenue, improve customer relations, and enhance return on investment in mobile initiatives.

Figure 1: Number of U.S. mobile workers (millions)



Source: In-Stat and IDC, 2006.

¹ "The Remote Revolution: Uptime Issues, Implications & Imperatives in the Mobile Workforce," BPM Forum, Dec. 2005.

The mobile challenge: Out of the office, not out of touch

Applications for voice- and data-capable smartphones range from general to unique, depending on the user and the task at hand. At the very least, wirelessly connected devices should enable mobile teams to:

- Build a closer relationship with customers by responding to their calls, emails and instant messages faster and more accurately;
- Engage in mobile information and idea sharing and team collaboration;
- Improve productivity by transforming downtime into productive uptime;
- Access business critical applications or receive automated alerts;
- Maintain tighter and more productive relationships with headquarters;
- Efficiently manage expense reporting, scheduling and other administrative duties.

Many organizations take advantage of the capabilities of smartphones like the Palm® Treo™ smartphone by extending their backend applications wirelessly, and utilizing the built-in Bluetooth wireless technology to connect Treo smartphones with third party peripherals such as barcode/RFID scanners and credit card readers for wireless data capture. In doing so, they avoid the expense of using many different single-purpose devices by replacing them with a single smart device that can easily be adapted for multiple uses within an organization.

The Treo smartphone not only provides a reliable link to vital corporate resources and emails, but can also be an important customer relationship management tool for sales and field service professionals who are working on the frontlines and have a constant need for just-in-time mobile information. Typically, these people use smartphones like the Treo to (see Table 1):

- Retrieve the latest product, inventory and pricing information on the go;
- Access the right resources (technical expertise, management authorizations, legal clarifications, etc.) to serve customers in a timely manner;
- Provide market information (on customers, partners, and competitors) to corporate headquarters for immediate analysis and/or response;
- Receive critical alerts such as changes to appointments and travel times; and then instantly adapt schedules to make the best use of time;
- Perform administrative tasks such as filing expense reports, reporting customer call updates, and other routines that usually take place at the end of the day, but can be done on-the-fly with a wireless device;
- Collect electronic signatures and order confirmation from customers to speed up billing and provide instant feedback on order status;
- Check the status of pending orders and provide timely reports to customers at the point of customer contact.

Table 1: Mobility services; major tasks on the frontline

Sales	Field service	Logistics	Others
Inventory and pricing checks	Receive and update work orders	Proof of delivery	Email product updates to customers
Administrative tasks	Update contract, SLA, warranty and billing	Dispatch and routing	Asset management
Collaboration	Service reporting and billing	Stock and inventory	Field inspections and surveys
Order entry	Knowledge sharing and management	Time tag and billing	Field intelligence collection

Source: Shoreline Research, 2006.

The Palm® Treo™ smartphone is not limited to field and sales force activities, but can be an indispensable tool in other field roles as well. Those involved in the transportation industries, for example, can use it to access dispatch and delivery information, file progress reports from the field and coordinate deliveries with customers worldwide. Back at the manufacturer’s warehouse, receivers can track delivery status via instant alerts, and manage the flow of packages and products.

Measuring mobile ROI: Productivity in motion

Businesses that equip their mobile sales teams and field force with wireless smartphones take into consideration the return on investment (ROI) of these devices as they track improvements in mobile productivity and workflow.

Day-to-day ROI can be difficult to track and measure for every individual in a sales and field force network. How these mobile tools are used and the habits and styles of each employee impact mobile productivity and performance. However, the ROI benefits of simply using a smartphone in the field to send and receive email are substantial and immediate.

On average, each mobile worker can recover 60 minutes per day in downtime by using a mobile device like the Treo™ smartphone, according to a user survey conducted in 2005 by Frost & Sullivan. This equates to an annual cost savings of about \$11,000 per mobile employee, considering an annual salary of \$89,000. (see Table 2)

The productivity benefits are even greater for employees and managers at higher salary levels, with yearly recovery averaging about \$14,000, according to the same study. Some steps to take in developing ROI metrics include getting mobile workers involved early in the selection and implementation process, and developing measurement programs and specifications that can be applied across a variety of users.

Table 2: Palm Treo smartphone payback period (in days saved, by employee compensation and deployment size)

# Employees	Salary Level							
	\$50K	\$60K	\$70K	\$80K	\$90K	\$100K	\$110K	\$120K
50	93	77	66	58	51	46	42	39
100	90	75	64	56	50	45	41	38
150	89	74	64	56	50	45	41	37
250	89	74	63	56	49	44	40	37
500	89	74	63	55	49	44	40	37
1000	88	74	63	55	49	44	40	37

Source: Frost & Sullivan smartphone user survey, 2005.

A day in the life of a Palm® Treo™ smartphone

When utilized with other business processes and/or applications, for example, ERP systems from SAP or Oracle, Business Intelligence solutions like Cognos or Business Objects, or CRM systems like Siebel or Salesforce.com, the Treo smartphone can enhance the productivity and effectiveness of a mobile employee. The following is a typical day for a sales rep in a mid-sized machinery company, one column showing business activities with a Treo smartphone and the other without a Treo smartphone.

Table 3: A day in the life of a Palm Treo smartphone

Mobile sales activities	With a Treo smartphone	Without a Treo smartphone
Lead management	<ul style="list-style-type: none"> ■ Receive fresh leads wirelessly ■ Update lead status immediately ■ Prioritize leads with the most up-to-date information 	<ul style="list-style-type: none"> ■ Receive/update leads when laptop is connected to internet (usually at the beginning or end of the day or week)
Account management	<ul style="list-style-type: none"> ■ Research account history, notes, and contract levels ■ Log calls and emails to accounts immediately after they occur 	<ul style="list-style-type: none"> ■ Rely on memory, try to find an Internet connection for laptop, or call for info ■ Update the accounts through laptop (usually at the end of the day or week)
Communication management	<ul style="list-style-type: none"> ■ Use combination of call/ email/ SMS to communicate with customer ■ Initiate and confirm a meeting with the most up-to-date information ■ Send important information, in multi-media format if needed, to all relevant parties ■ Receive an important contract, make needed corrections on Treo and send it back as attachment 	<ul style="list-style-type: none"> ■ Call the customer and leave a message if not there ■ Set aside a time slot for a meeting and wait for confirmation of availability ■ Send important information when back at the hotel or when laptop is connected ■ Miss the deadline to correct the contract
Order management	<ul style="list-style-type: none"> ■ Check inventory level and price book in real time ■ Request discount approval, and automatically escalate to the appropriate person if needed ■ Arrange delivery to customer site 	<ul style="list-style-type: none"> ■ Call someone in the warehouse to check inventory ■ Call again for a different quantity ■ Or, open laptop, connect to Internet, establish VPN, launch inventory management system.
Workflow management	<ul style="list-style-type: none"> ■ Use GPS connected to Treo to find the right location ■ Use a barcode scanner to find the part number, service history, inventory level, etc. ■ Ask customer to use Treo smartphone's touchscreen to sign to confirm an order and click check boxes to insert signature. Order processed immediately 	<ul style="list-style-type: none"> ■ Buy an expensive dedicated GPS, or print out a map or driving directions ■ Write down the part number and call someone to check it ■ Complete multiple forms. Ask customer to sign them all. At the office, send forms to someone for data entry, storage and processing. If the forms are lost or damaged, start the process again.

Finding the right mobile solutions fit : An approach to empowering mobile field employees

Many companies require that their sales and field force employees spend more time on the road to maintain closer contacts with their customers and keep a few steps ahead of the competition.

However, when mobile employees are out of the office, it can become difficult or inconvenient for them to get the latest information, or to share their information with other co-workers, both in the field and at home or branch offices.

The goal, then, is to find the right mobile devices to access critical applications, view and edit documents such as Microsoft® Word, Excel®, and PowerPoint® files, communicate with stakeholders through email and phone, and surf the web, all wirelessly.

The task of selecting the best and most appropriate mobile solution becomes simpler when the deployment plan is organized into three key areas: Devices, Applications, and Business Processes. (see Figure 2)

Mobile devices

Choosing the **operating system** for the mobile device is the first decision to make. This will determine the user interface, the range of supported applications, the choice of application development tools, supported peripherals such as barcode scanners, credit card readers and GPS receivers, and the stability of the mobile platform.

User experience is another very important factor as you evaluate mobile devices, since a mobile worker simply won't use a device to its full advantage unless it is easy to use. More than ever, enterprises are looking for a 'single flexible device' solution in a world filled with *single-purpose* devices that are usually not extensible enough or capable of meeting the needs of mobile executives.

Features that are absolutely required for a mobile device to be optimally productive include a sharp and easy to read viewing screen, an optimized and comfortable keyboard, a navigation tool for one-handed use, and ergonomic features such as a touch-sensitive screen. Ideally, the device features a compact all-in-one design that doesn't sacrifice function for form. Battery life is also important, since field personnel often need to use the device for a full work day of application use, calls, and emails.

Smartphones should also support high-speed data **networks** to allow fast upload and download of attachments or data flows, and be able to connect with peripherals like barcode scanners, mobile printers and mobile credit card readers.

The ability to **manage and secure** wireless devices, especially smartphones delivering corporate data, is also critical. Lost or stolen devices could lead to the release of confidential corporate or customer information. This is why it is critical to select a mobile device that makes use of state-of-the-art protection and security compliance features that ideally make use of over-the-air (OTA) management techniques.

Some of the most popular OTA management features include:

- Wipe out data, delete/install/update applications
- Monitor/remove unauthorized application installations
- Provide license management
- Monitor and enable password policies
- Backup and restore data
- Lockdown data ports (SD, mini-SD, Bluetooth, IR, USB, etc.)
- Verify digital certificates and authentication
- Install and update anti-virus applications

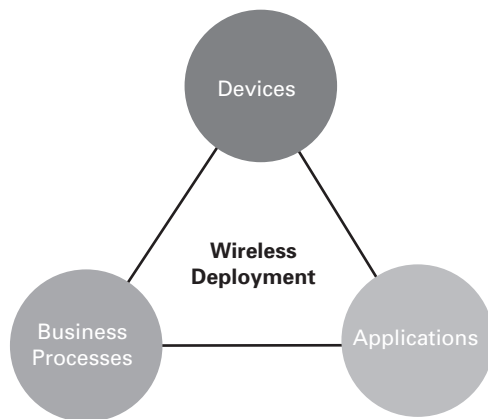
Applications

Applications support and compatibility are critical, since mobile devices must be able to perform independently and communicate seamlessly with leading applications and information management systems that reside on remote corporate networks.

Mobile devices typically connect with backend systems through one of the following two methods:

- **Smart-client**—a sophisticated client runs from the device and allows a user to input or retrieve information from the application regardless of whether there is a live data connection or not (some functions or features might be limited or not available when there is no data connection).
- **Thin-client**—requires the user to have a live wireless data connection with the backend systems in order to use the application. This method is relatively easy, although access to all functions is totally dependent on network coverage and speed.

Figure 2: A mobile device selection formula



Source: Shoreline Research, 2006.

Business processes

Finally, it is crucial to consider a company's fundamental business processes and workflow when selecting a mobile device with the right fit for mobile employees and the entire enterprise architecture. Scalability and compatibility with existing technologies and technology strategies are key concerns, as is a mobile system's ability to help streamline the business process.

A mobility selection and deployment checklist

A well-executed wireless solution can have a dramatic impact on the productivity, performance and collaborative capabilities of mobile sales and field services employees. Applications, business processes, and wireless devices are the three pillars that will determine the success of a wireless deployment. It is critical that organizations plan their strategies, resources and milestones carefully so that the solution is capable of handling current mobile business demands, and flexible and scalable enough to meet tomorrow's challenges.

The following are ten key points to remember when selecting and deploying a wireless solution across a mobile work force:

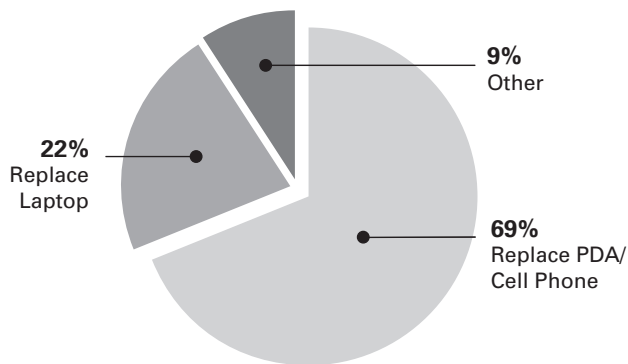
1. Establish your mobility strategy; decide what the business objectives are for your mobile solution and set realistic goals;
2. Look for vendors that can provide the right mobile solutions and services to solve your business problems and address your pain points;
3. Set up a small and manageable pilot project to test mobile devices and applications in a real-time setting;
4. Look for mobile devices that can be easily adapted to multiple applications within your organization;
5. Make sure the devices are compatible with existing IT infrastructure and communications standards;
6. Establish a realistic timetable for testing and deploying and evaluating the success of the solution;
7. Establish clear metrics for measuring ROI;
8. Fully train the pilot project team, and then have that team educate others in the company;
9. Establish a solid security framework that protects data end-to-end;
10. Develop clear methods to handle mobile asset management, virus scanning, and deployment of software upgrades.

Conclusion: The Palm® Treo™ smartphone, a smarter and more productive mobile alternative

While the productivity benefits of a smartphone are usually based on how much time is saved or revenue generated by employing a fast and capable mobile solution, there are other equally tangible advantages of using a flexible and scalable wireless device like the Palm Treo smartphone as part of your mobile arsenal.

Since most smartphones are deployed as replacements for both a PDA and traditional cellular phone, there is the immediate cost savings of using a single device to perform multiple applications.

Figure 3: Palm Treo smartphone utilization in the enterprise



Source: Frost & Sullivan smartphone user survey, 2005.

Nearly 70% of the companies purchasing Treo smartphones for their mobile employees do so to replace individual PDAs and 12-key cell phones, reports market researcher Frost & Sullivan in a survey conducted in 2005 of business executives and IT professionals. Approximately 22% of the companies surveyed said a Treo would replace a laptop computer as a mobile field device. (see Figure 3)

The adoption and use of wireless handheld systems with both voice and data capabilities can improve a mobile professional's ability to respond to customer demands and react to time-sensitive information; provide input to a project that is being worked on by multiple people or teams across a wide geographic expanse; and increase workflow performance in the field.

In fact, according to the Frost & Sullivan survey, the workflow efficiencies of sales people in the field can improve by up to 29%, which has a direct impact on a company's revenues and bottom line.

About Palm

Palm, Inc., the pioneer in the mobile computing space, delivers real-time access to critical information for field employees, producing measurable impact on worker productivity. Palm's diverse product offering, featuring the award-winning Treo and our line of handheld computers, has become increasingly popular among sales and services organizations due to our hallmark ease-of-use, lower TCO, and superior ROI. Benefits of Palm's mobile field solutions include realtime visibility of work order status, improvement in billing cycle or days sales outstanding and stoppage of revenue leakage, all in an environment where company data is portable yet secure.

Palm has partnered with leading ISVs and System Integrators to deliver integrated solutions to the marketplace, ranging from barcode/RFID/NFC readers to electronic forms, Location Based Services (LBS), Sales Force Automation (SFA), Field Force Automation (FFA) and CRM solutions. To read more about Palm's success in Sales Force/Field Force Automation, visit <http://www.palm.com/us/enterprise/>



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