

## Field Sales Mobility Best Practices

Mobile field sales initiatives pay off through increased productivity and greater revenues, whether the sales effort involves placing products on retail store shelves or closing a deal on a multi-million dollar piece of equipment. A mobile virtual private network (VPN) such as Mobility XE™ from NetMotion Wireless is the key to achieving best practices in a deployment and realizing the full benefit of the investment. It provides secure, reliable network connections for mobile professionals; builds user acceptance to overcome common change-management issues; and allows greater span-of-control for sales managers and IT staff.

### The Drivers Behind Mobile Initiatives

Giving sales personnel access to applications from the field is a near-universal practice. In a recent survey of enterprises spanning multiple industries across North America, South America and Europe, 87% of respondents indicated they extend mobile access to their sales professionals. Key reasons cited for the mobile deployment were to increase worker productivity (90%), resolve customer issues faster (83%), increase sales revenues (70%), reduce sales cycle time (65%), and cut inventory costs (54%) (Forrester, February 2010).

**Reliable access made to order.** Arming mobile representatives with direct access to applications streamlines the sales process, improves the customer experience and expedites the entire supply chain. Transmitting and entering orders in real-time, rather than batch-processing at the end of the day, allows them to verify inventory from the field and adjust orders as necessary. It also provides more lead time for just-in-time manufacturing and pick 'n ship operations, maximizing fulfillment and revenues.

Organizations that deploy sales force automation and customer relationship management systems are not only making those available online, but also expanding the scope of resources available for finding and nurturing new prospects. They encompass not just access to customer sites, but also social networking sites and aggregated sales-intelligence resources.

#### Unilever Counts on Mobility XE for Field Sales Productivity

With a product portfolio that includes some of the world's best-known brands, Unilever operates in more than 100 countries worldwide. Its 1500-member sales team carries Windows® mobile devices to access real-time information and submit sales orders for immediate processing. After evaluating a wide range of alternatives, they selected Mobility XE for its reliability, policy-management capabilities, support for RSA SecurID two-factor authentication, and track record of successful large-scale implementations.

*"NetMotion Mobility XE is the only product which met all our requirements...including secure and persistent application connectivity for a variety of PDA devices."*

- Richard Oxenham,  
Mobile Solutions Specialist

The Mobility XE mobile VPN makes access to all of the applications more reliable, so sales personnel who find the prospects, satisfy the customers, sign the deals and write the orders can focus on their jobs. Time spent dealing with mobile devices and connections is freed for serving customers and in some deployments has led to millions of dollars in increased sales. Sales organizations across a range of industries rely on Mobility XE. They include distribution, medical products, technology, and industrial and consumer packaged goods.

## The Role of a Mobile VPN

Implementing a mobile-computing system can be a challenge because it typically involves significant organizational change and new work habits. Selecting the right VPN – an often-overlooked yet vital piece of the infrastructure – is essential to facilitating a successful rollout.

Mobility XE is a mobile VPN widely used within sales organizations. Like a conventional VPN, it secures enterprise data across public networks through encryption, and protects corporate networks by ensuring that only trusted users and devices gain access.

However, it does much more: It is the key to delivering the full promise of the entire mobile deployment. Mobility XE is expressly designed for the unique characteristics of mobile environments, where workers roam and use computing devices constantly, while expecting uninterrupted use of open applications throughout the workday. Mobility XE is the essential “glue” that ties together multiple networks including various cellular data services and Wi-Fi, aggregates disparate mobile devices, and manages them as a single virtual network and deployment.

With Mobility XE, organizations can:

- Increase the number of sales calls made per-day and free up more face time for customers
- Ensure that field representatives have the most current data on product specifications, availability, lead times and ship dates for more responsive customer service
- Enable real-time order entry, expedite fulfillment, speed invoicing and streamline the entire supply chain
- Reduce the number of help desk calls from salespeople
- Maximize the return on investment in mobile devices, applications and wireless connectivity

### Leading Food Distributor Increases Customer Visits, Achieves Higher Sales

With revenue riding on more-efficient order entry and fulfillment among its 5,000 salespeople, a major food service company was ripe for a mobile solution. To give continuous access to CRM and order-management systems, the company adopted Mobility XE. For maximum efficiency, policy management gives priority to critical applications during business hours, while allowing management software to run at night for laptop updates. The deployment adds one more productive hour per employee per day – an effective productivity gain of 600 full-time employees annually. This allowed for more customer visits, and the ability to provide greater customer service.

*“There’s no user intervention required, they just turn on their laptops and it works... The benefit to the business is feet on the street. Giving the sales managers back an hour a week...lets them visit additional accounts.”*  
- Director of Operations

Any application that runs over a wired network works in a wireless environment with Mobility XE. It facilitates mobile field-sales initiatives involving applications such as:

- Customer relationship management (CRM)
- Order entry
- Inventory management
- Invoicing
- Route management
- Corporate e-mail and office applications

## Deployment Best Practices

Common challenges that organizations face in field deployments are described below, as well as the role that Mobility XE plays in achieving best practices.

### Secure, Seamless User Experience

The most common reason for failed mobile deployments is lack of user acceptance. If field tools are cumbersome or difficult to use, workers will not embrace them.

As many organizations have discovered, connectivity problems are the most common source of frustration. Workers often lose connections and need to re-log in; and when applications are running during those interruptions they often crash, requiring workers to not only log in again, but re-enter the data they lost.

Mobility XE makes the wireless experience secure and transparent. It handles logins automatically as sales reps transition between various cellular networks and access points, and keeps the applications and connections alive as they traverse those boundaries and encounter coverage gaps.

Workers only need to log in once at the beginning of their work day. This single sign-on also supports two-factor and multi-factor authentication (via smart cards, RSA SecurID tokens, or device certificates) for a seamless, secure user experience. Workers freely use their devices without having to manage connections. Plus they can suspend or hibernate applications throughout the day without having to reauthenticate or risk data loss. Data connections remain secure without hindering users.

#### Packaged-Goods Company Efficiently Manages Nationwide Deployment

For an enterprise with more than 100 perishable products, a nationwide distribution network and annual sales of \$280 million, an efficient supply chain and distribution are essential. Their sales force carries specialized, Windows-based handheld mobile devices. Route management functions place and receive orders; manage inventory; create invoices and returns when products are distributed to stores; report shipping discrepancies; and communicate with company sales management. Mobility XE ensures secure, reliable access and makes the entire deployment easier to administer. It supports remote application and security updates, as well as centralized device management and user authentication.

*"We considered several alternative solutions, including other mobile VPN applications, but due to the robust administration features and analytical reporting, we decided to go with Mobility XE."*

— Director of Applications

In mobile deployments that begin with conventional VPNs and are subsequently replaced with Mobility XE, this simplified user experience leads to significant productivity gains.

In new deployments, it delivers a positive user experience that facilitates change-management and speeds adoption of the applications to hasten ROI.

## Management Control

Managing mobile devices across a dispersed workforce is a challenge, and more so in large deployments. Securing and maintaining hundreds or thousands of field-based devices, miles from the corporate data center, is much easier with Mobility XE.

**Control over device use.** Giving the IT team and field managers control over remote devices allows them to:

- Set and enforce policies to manage user and device access to networks
- Improve security and protect users from inadvertently taking action that bogs down devices or connections
- Set rules to limit access to specific applications, prohibit web browsing, or restrict access to intranets or specific sites
- Enforce restrictions based on connection speed or time-of-day
- Prioritize users by line-of-business applications, so critical traffic has the highest priority

This policy-management capability is especially useful for keeping file synchronizations and other large data transfers off of cellular networks, when they might interfere with applications that support the real-time sales effort. Workers carrying laptops, handhelds or smartphones can all have different policies, or supervisors may have policies separate from the workers they manage.

**Visibility into usage patterns and problems.** Monitoring performance across multiple networks is a challenge, especially when networks are outside of IT's direct control. Mobility XE Analytics measure and report on device, application and network usage. Administrators can spot coverage or connection problems, find high-bandwidth consumers, drill down to monitor traffic patterns, verify version details, monitor battery life and much more. In addition, proactive notifications based on adjustable thresholds can dramatically decrease help desk calls. Staff are alerted to potential device or network problems so they can be resolved before they disrupt users or impact service quality.

**Security enforcement.** Mobility XE Network Access Control software verifies that devices have required security precautions in place – such as patches, operating system updates, and active antivirus with current signatures – before allowing a connection. Depending on the severity of the issue, administrators may choose from a variety of actions, ranging from simply warning the user, to requiring immediate remediation, to quarantining the device. This gives administrators the flexibility they need to protect the corporate network without hampering the sales force. They can

also automatically remediate the device, at a time and in a way that doesn't interfere with its productive use.

**Patch management and upgrades.** Mobility XE allows field-based devices to be managed “over the air”, through third-party systems management software, as easily as the organization manages desktops and laptops on the wired corporate network. Application updates and patches may be pushed out while the unit is still in the field, but when users aren't actively logged on. This eliminates the need to dock a unit or wait for a wired connection and can provide significant labor and cost savings for IT staff.

## Conclusion

Mobile initiatives are widely used and proven to deliver bottom-line results for sales organizations. Deploying a VPN built for mobility such as Mobility XE is essential to realizing the full benefits of the investment and achieving best practices. These include delivering secure, reliable network connections, promoting user acceptance, and gaining management visibility and control. In this way, organizations can ensure that they achieve greater productivity for their sales personnel, deliver a positive customer experience, and foster an efficient and steady pipeline of new orders for the enterprise.

## For More Information

For field sales case studies and more information about Mobility XE, please visit [www.netmotionwireless.com](http://www.netmotionwireless.com).

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