

Case Study



Mobile Sales Force at Growing Company Benefits from Mobilizing CRM Information to the Field

Organization: Sales Partnerships Inc. offers outsourced sales force services to its medium and large enterprise customers.

Industry: Business Services

Region: Americas

Company Size: Medium Enterprise – 100 employees

Email Environment: Microsoft® Exchange

Type of Solution: Sales Force Automation – CRM

Solution: Mobile Contact Management System – developed using Flowfinity Actions and accessing SQL CRM database

BlackBerry Alliance Member: Flowfinity Actions by Flowfinity Wireless Inc.

Challenge: Sales Partnerships needed a way to coordinate the activities of the outsourced sales force services it offers. They wanted a solution that would help maximize the productivity of the sales force by tracking sales activities, handling territory management, and creating a high level of accountability for the sales representatives working in the field.

Solution: The company used Flowfinity Actions to mobilize their in-house CRM solution for the BlackBerry® smartphones carried by sales reps. Sales people were given access to customer account information, sales histories and sales progress. They could log their sales results on the spot for future company analysis and coordinate those results with in-house territory management tools.

Sales Partnerships' Results:

- More effective sales teams
- Better analytical information
- Less paper and reduced administration
- Assists company's growth strategy



The Challenge: Better Customer Account Management and Sales Rep Tracking from the Field

Sales Partnerships Inc. provides external sales force services to mid and large-sized companies who need skilled and accountable sales representatives to market their products. These branded sales people sell various customers' products in key markets or territories. Because they sell under the brand of the client, rather than Sales Partnerships, brand protection is critical to their relationships.

When Sales Partnerships began to take on strategically important business relationships requiring large field sales deployments, teams of sales people began cold-calling on behalf of their clients to their customers in the field. They faced the challenge of trying to coordinate the activities of large mobile sales forces using cell phones and handling all the reporting from the assignments on paper.

"When you have between 30 to 100 sales staff on-the-road, a paper solution becomes administratively intensive and extremely inaccurate," says Aaron Kullman, Vice President and COO. "It's also very slow to inform sales people about new target customers and share their records, when it's being done over a phone and by paper lists."

Sales Partnerships decided to mobilize their own internally created sales contact and territory management solution. It would give them the ability to easily share important customer information with sales reps and track their progress in the field.

Why the BlackBerry Solution?

Many of the sales people that work for Sales Partnerships come from environments where they were not required to use sophisticated technology. Sales Partnerships was very aware that they'd have to introduce a technology with a quick learning curve that would create minimal stress on their users.

"One of the things we really liked about the BlackBerry smartphone is the ability to have a full QWERTY keyboard," says Kullman. "Sales reps quickly become comfortable typing information into the device. The BlackBerry smartphone is easy to learn."

A small device also beat out the idea of giving everyone a laptop. Most of the sales reps do not have their own offices, and come in to the office only once or twice a week. Laptops would have been cumbersome, expensive, and hard to maintain in an outside sales environment. With the BlackBerry smartphone, the reps get a phone, email, contact management software, and multiple communications tools – all in one easy-to-carry package.

Sales Partnerships was also concerned about having their sales teams carry around paper documentation that could easily be lost. Since some of this data is sensitive customer information provided by their clients, security was important too. The security capabilities of the BlackBerry® solution helps to protect this private information, even if the device is lost.

"It's an advantage to have all the information in one place. The ability to look up records, receive leads, edit and manage records, set and track appointments and report results are big advantages of using Flowfinity Actions on the BlackBerry smartphone."

~ SALES PARTNERSHIPS, Field Sales Representative

Partner Profile:



Company: Flowfinity Wireless Inc.

- Develops customizable solutions that aim to deliver high usability wireless applications with point and click ease
- Provides out-of-the-box mobile applications designed to automate mobile data collection, mobile data publishing and field force task management
- Has a growing base of customers in North America and Europe

Featured Product: Flowfinity Actions

Application Type: Sales Force Automation – CRM

"I like how flexible the Flowfinity product is. They have a powerful development environment that we've leveraged and we control the central database, which I like."

~ **Aaron Kullman**, Vice President and COO,
Sales Partnerships Inc.

For more information, visit www.flowfinity.com



Alliance Member

New Mobile Contact Management System Offers Visibility During the Sales Process

Sales Partnerships had their own SQL-based sales contact and territory management system for managing customer accounts and sales activities. But no one in the field had access to it. By using Flowfinity Actions point and click application customization capabilities, they quickly created a solution for the BlackBerry smartphones that offered system access and reporting from the field.

Sales Partnerships named the solution the Mobile Contact Management System. With Flowfinity Actions, a sales rep receives information on their BlackBerry smartphone about specific customer targets from a central database within the company. As they complete their calls during the day, they update the results of a sales call right after it happens. Once inputted, Flowfinity Actions allows the data to be immediately sent and updated in the database.

"The data is more transparent from a sales rep's point of view," says Kullman. "They receive a direct benefit from entering the information into their BlackBerry smartphone because a feature of the solution allows them to track their progress with a customer. They're better able to organize their selling activity around the likelihood of closing the sale."

"The BlackBerry smartphone and the Mobile Contact Management System makes me more effective because it is more time efficient, and time is money," says one sales rep. "It's a money maker for me."

The same data helps coach sales reps. Instead of basing feedback on raw sales numbers at the end of a sales period, this solution allows sales management to watch daily activity and spot trends. These valuable reporting tools help sales personnel stay sharp in a competitive environment.

"This Flowfinity Actions application on BlackBerry smartphones is critical to the short and long-term success of our field sales programs. Without a unified system to track, distribute and manage data, the scalability of our organization would have been threatened."

~**AARON KULLMAN**, Vice President and COO, Sales Partnerships

Less Administration Helps the Company Grow

The manual system of gathering information has been eliminated. This has a direct benefit on field personnel: "I would say it saves about two hours in a work day and another hour at home not having to organize daily paperwork, and complete filing and compiling," says one sales rep at Sales Partnerships.

Flowfinity Actions is integrated with Microsoft SQL Reporting service so that Sales Partnerships can build the reports they need to leverage the work of back office personnel and provide management with vital information.

"Flowfinity Actions, the BlackBerry solution and our Mobile Contact Management System have substantially reduced the workload on our administrative staff," says Kullman. "We had a very paper-driven system before, and the ability to remove all that, and transmit information using the BlackBerry smartphone is a major efficiency improvement. The solution helps our administrative staff do other tasks for the sales force which allows the reps to focus just on selling."

Kullman estimates the solution is saving hundreds of administrative hours per year in building reports and distributing the information. "Our BlackBerry solution and Flowfinity Actions has essentially allowed us to maintain a minimal staff associated with our services," he says. "Without it, I think we would have tripled or quadrupled the number of administrative and support staff we employ."

For more information on BlackBerry solutions, visit www.blackberry.com/go/success

Sales Partnerships' Results

More Effective Sales Teams: Sales reps have new sales leads pushed to their BlackBerry smartphones within minutes, have improved access to customer contact information and can track the progress of a sale to better target their approaches and close more deals.

Better Analytical Information: Automatically generated reports help business leaders know exactly how sales teams are performing. This information is useful for training, territory management, company planning and to provide feedback to their customers.

Less Paper and Reduced Administration: Data captured in the field is automatically sent over-the-air to back end databases, reducing data entry costs and keeping staff costs low while increasing sales rep time to actually sell.

Assists Company's Growth Strategy: The BlackBerry solution is cost-effectively supporting Sales Partnerships' new business focus and plans for growth.

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