



From: www.cio.com

CRM for Road Warriors: Phone or Laptop?

– David Taber, CIO

April 05, 2010

All too often, the cries for mobility have come from vendors trying to sell you devices and add-on software. But in today's field sales and support environments, the business drivers to support road warriors are crystal clear. Many of your sales reps work from their home office. And all of your field force is supposed to be at client sites, not sitting at their desks in headquarters.

The good news is that the technology for on-the-road CRM is really here, mature even if not perfect. And the devices that you need to run CRM on are the devices that most of your field force already has: laptops, 3G/4G cards, and a RIM or iPhone device. Remote access to CRM is available almost everywhere it's needed worldwide.

[For timely data center news and expert advice on data center strategy, see CIO.com's [Data Center Drilldown](#) section.]

Of course, the big debate in CRM has been on-premises vs in the cloud. For companies with highly distributed offices (such as branches, franchises, or satellite offices), using Citrix or other remote-desktop solutions can be made to work. But when users are on the road, the latency problems of on-premises CRM become insurmountable. Of course, low-end SFA tools can be made to run locally on the user's laptop. But provisioning and replication of dozens or hundreds of road-warrior databases is problematic at best. And the situation for mobile devices is basically hopeless.

The SaaS model of CRM avoids all of these problems and makes the user experience on the road absolutely on par with what the user would get at headquarters. Essentially every vendor works just fine with a 3G/4G card and a laptop, and there is no software to provision or support. All of the system customizations are available from the remote machine, and security is maintained (particularly if your admins remember to turn on https mode for the CRM system).

Things get a little dicier when the users go off-network. Salesforce.com and Microsoft ([MSFT](#)) (among others) offer offline mode for their CRM systems, allowing users to cache records and access/edit them without a network connection. Perfect for airlines and buildings where network access just can't happen. Replication on reconnect is straightforward, typically following a "last update time wins" pattern. However, offline mode typically will not support all of your system customizations, and some advanced features will not be available at all without network connectivity. Further, the unavailability of documents or records from interfaced-systems (such as accounting or inventory) limits the utility of offline mode to fairly simple record updates.

For all remote and on-the-road staff using laptops for CRM, make sure they have solid [ILP/DLP software](#) installed on their machines. You don't want your prospect and customer records pulled out of your system — whether by competitors or employees.

A better approach is accessing the SaaS CRM system from mobile devices. Due to screen real estate and browser-cookie issues, accessing the CRM from a smartphone browser is ridiculous. Instead, the leading vendors have native smartphone-UI implementations of their CRM clients that are attractive and intuitive. Watch out for the following, though:

- Support for devices is relatively narrow. BlackBerry and Apple devices probably have support from the most vendors.
- Screen size matters more than for most smartphone apps.
- Memory constraints are a big issue. Typically you'll need at least 10MB of spare RAM, and much more than that for large CRM databases.

- If you have a lot of leads, contacts, appointments, and notes, pulling the data down can take a long time. In some device/CRM combinations, you can hold only 2000 records at a time, causing annoying delays if you need to access something that's not cached on the local device. This is an area where the iPhone seems to have a significant advantage, thanks to its available memory.
- Even though there's data caching on the smartphone, the CRM functionality depends upon network connectivity. If your field workers are in secure facilities or buildings with no 3G/4G access, the functionality available offline will be very limited.
- Some of your system's customizations and extensions are not likely to be available in the Smartphone UI. Of course, none of your external integrations will be available, and some of your documents may be difficult to get to (and probably impossible to read).
- Reports, dashboards, and fancy graphics may be available, but will be essentially unusable in the mobile version.
- If your mobile device doesn't have an unlimited data plan, you'll probably need to upgrade to that level.
- There may be more than one version of mobile apps for your CRM package. This is an area where you really get what you pay for: you'll almost inevitably need the most expensive version.

Will the [iPad](#) become the next mobile CRM client? It's a nice device with enough screen real estate and horsepower — but I don't see it as being versatile enough to be the sales rep's or field tech support's only computer. That said, stranger things have happened in this industry.

David Taber is the author of the new Prentice Hall book, "[Salesforce.com Secrets of Success](#)" and is the CEO of [SalesLogistix](#), a certified Salesforce.com consultancy focused on business process improvement through use of CRM systems. SalesLogistix clients are in North America, Europe, Israel, and India, and David has over 25 years experience in high tech, including 10 years at the VP level or above.

Follow everything from CIO.com on Twitter [@CIOonline](#).

© 2010 CXO Media Inc.