



versatile

TURNING DATA INTO KNOWLEDGE

Mobile Sales Force Automation

Comparing Computerized Sales Processes With
Manual, Paper Based Systems



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Mobile Sales Force Automation

The mobile workforce is the last frontier of computerization

The purpose of this White Paper is to highlight the advantages that a **computerized sales process**, such as the Versatile Systems *Sales Supervisor* software solution, provides to business. This automated solution is compared to the traditional paper based or even a simple PDA order capture system used in a mobile sales strategy. Readers of this paper will better understand the benefits that are derived from full blown Sales force automation using Versatile Systems software operating on the new generation of *Pen Tablet Computers*.

The White Paper explains how Sales Supervisor's intuitive graphical user interface makes the system easy to use and how customer relationships can be improved and enhanced. It explains how the productivity of the mobile workers can be improved and the accuracy of the data they collect can be increased. The White Paper explains how accurate and timely data, coordinated and processed with Sales Supervisor's analysis tools, will help management make better operational.

Sales Supervisor – Meeting the sales automation challenge

The ability to effectively manage customer information is critical to the success of any business. A customer information management system should be easy to use, allow connection with customers effectively, and manage sales processes efficiently. Sales Supervisor empowers businesses to increase productivity by managing customer information digitally versus using traditional paperbased systems such as a Rolodex, day planner, manila folders, notebooks, and index cards. There are critical challenges for businesses with mobile sales forces; are their workers effectively managing customers, maximizing sales, gathering the data needed to assess performance?

Management must help its workforce meet these challenges; provide organized customer information, make it easy to find and update, ensure that it is useful information. Sales automation software, unlike paper-based solutions, unleashes the power to quickly and accurately store, update and access large amounts of information.

Sales Supervisor provides a number of advantages and benefits over paper-based systems:

- Ease of use by the sales force leading to increased daily client/store visits.
- Aids and improves customer relationships by providing accurate and timely

- merchandising information to the customer.
- Increases sales force productivity by increasing speed of field data collection and eliminating costly pre-printed forms and storage.
 - Improve accuracy of data by reducing lost, misplaced and incorrect orders and eliminating manual sales/data entry administration.
 - Improve understanding of data by generating detailed and clear management reports on sales activities and customer buying trends.

Sales Supervisor Is Easy To Use

Sales Supervisor maintains all customer information, sales, merchandising and communications in one place, making it easy to find customer-related documents instantly and link information such as e-mail messages, tasks, and files (even video clips) back to customers.

Sales Supervisor gives the mobile sales workforce access to information in an easy to use format that allows updating, searching, and quick retrieval of information. Sales Supervisor utilizes the latest pen technology to give users an intuitive method of entering data and navigating through the software. Tasks that are difficult and time-consuming with paper-based systems become simple and consistent thus reducing training time and keeping the workforce out on the road in front of customers instead of behind desks writing reports.

Paper-based systems rely heavily on the user's memory, it is easy to make mistakes or forget critical information. Sharing information between mobile workers with paper-based systems is extremely difficult; each user must maintain their own system. A replacement worker will either spend time reorganizing the paper to fit their own style or miss important selling opportunities. As an example, finding a customer telephone number in a paper-based system may involve trawling through phone books, folders, loose pieces of paper. With Sales Supervisor, finding a contact's telephone number is only two screen clicks away.

It is difficult to put a value on customer information, losing it could be catastrophic. Sales Supervisor stores information in a database that is backed up and can be restored. All data is stored centrally, if a tablet or laptop is damaged or stolen a replica can be created in minutes, there is no loss of data, no time wasted. Paper-based systems are inherently risky; papers can be lost, stolen, accidentally thrown away or eaten by the dog. Backing up a paper-based system is nearly impossible and can be hugely expensive. Many businesses do not have the time and resource available to back up a paper based system. Sales Supervisor's database is backed up automatically every night.



Keep Sellers Connected With Customers

Sales Supervisor allows the mobile workforce to build stronger customer relationships. With Sales Supervisor, workers are automatically reminded of opportunities to connect with customers in personal and meaningful ways. Reminders can be set to automatically create tasks to follow up with customers in a timely manner which is more effective than a sticky note attached to a piece of paper in a folder in the passenger seat of the car.

Makes The Workforce More Effective

Sales Supervisor provides insight into customers that makes the workforce more productive. Featuring built-in reporting, order history and product list tools, customers and their buying habits are tracked allowing targeting of products and promotion to maximize sales in ways that are simply not possible in paper-based systems.

Sales Supervisor includes many pre-formatted reports that are ready-to-use, customized reports can be created by sorting and filtering information to get just the information needed. This reporting functionality gives management the power to analyze, to see customer information from different angles and gives insight into sales performance and merchandising data. Paper-based systems rely on anecdotal history and workers memories, this lack of reporting capability, inevitably leads to missed opportunities.

Sales Supervisor tracks the history of orders and responses to merchandising and marketing surveys. This allows the sales force to monitor customer behaviour, a task that is almost impossible to keep up-to-date with a paper-based system. This history is automatically created and updated ensuring the right data in the right workers hands for the right situation making them more efficient.

A 'product list' feature, allows the tracking of product name, price and quantity available, even data sheets, images or videos of the products can be 'attached' to the product description. Price lists can be created for an individual customer, for groups of customers or for the whole customer base. Similarly bonus deals can be targeted, rewarding customers for their loyalty or buying power.

With reporting, history, and product list tools, Sales Supervisor provides insight into a business that makes the workforce more productive. This allows them to spend more time with customers and less with the complexities and inefficiencies of paperwork.



Enables More Accuracy

Paper-based systems are inherently inaccurate, faxes can be difficult to read, orders read over the phone can be misheard or incorrectly entered, postal orders can be delayed, all resulting in lost or incorrect orders. Sales Supervisor orders are available to the warehouse distribution team as soon as they are sent and they can be sent as soon as the customer visit is complete. The friendly interface means that orders are easy to enter and are only recorded once, reducing the scope for error and consequently the cost of errors.

Maintaining product and sales data

Maintaining information in Sales Supervisor is faster and easier than paper-based systems. When a customer's information changes, or a new customer is added, all information is quickly updated using the Sales Supervisor Management tools. This results in a situation where a change only needs to be made once and is quickly available to every worker that needs it. With paper-based systems, the information must be updated in multiple locations, taking time and potentially leading to errors. By maintaining information in Sales Supervisor, the workforce has the collateral to keep customers informed of the latest products. The ability to include pictures, movies, data sheets, documents, spreadsheets, maps to products and complete customer profiles gives the workforce the tools they need to operate most efficiently.

A complete technology solution

The purchase of any software has inherent risks. The purchase and deployment of software to a universe of mobile sales reps, with the requirement to transmit orders to a central office over various communication carriers (wired, wireless, WiFi) can be a significant challenge. Many sales representatives have limited computing skills and there may be a requirement for multiple languages. The selection of the vendor and the robustness of the software are critical success factors.

Sales Supervisor, developed to ISO standards has been certified and complies completely with Microsoft standards for back office and mobile Pen computing. It is a mature product that has been in use for several years in one of the world's largest sales and merchandising companies. It can be integrated with back office systems such as SAP or others using well-defined and robust file transfer standards.



Sales supervisor can also stand alone as a powerful self-contained mobile and back office sales and merchandising application or it can be purchased from Versatile Systems in a hosted model.

Sales Supervisor has complete user and technical documentation, which combined with the skills of Versatile Systems staff, can ensure a fast and reliable implementation. Software support agreements and even help desk services to directly support the mobile workforce can be purchased from Versatile Systems.