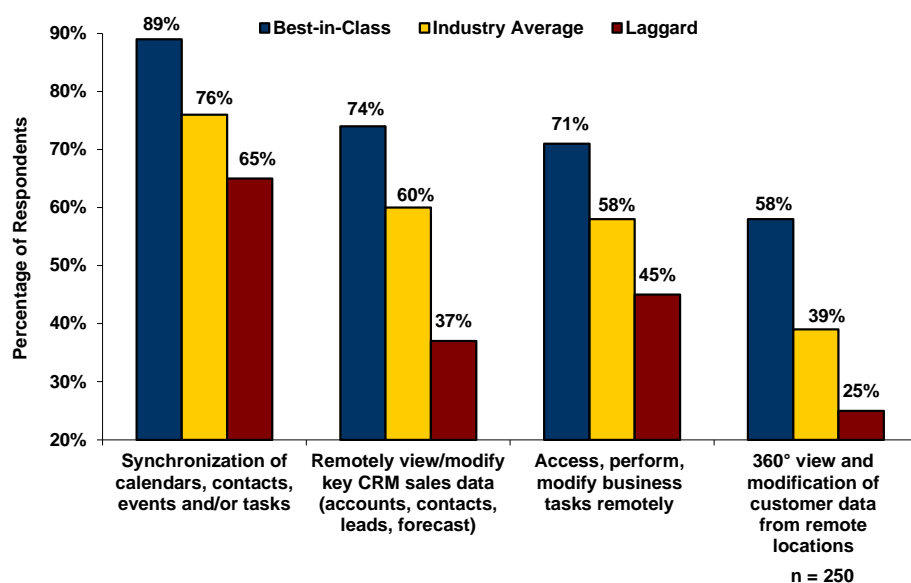


## Best-in-Class Companies Deploy Sales Mobility Practices to Better “Seal the Deal”

Customer Relationship Management (CRM) and Sales Force Automation (SFA) access via smart phones has been available for a long time now. Still, the actual activities performed by remote sellers have traditionally been focused on “seeing” rather than “doing.” In other words, hand-held devices allow field staff to view contact data, perhaps see their sales forecast or commission tracking, and conduct basic email communications. Adoption of more advanced functionalities, however, has so far remained elusive. This Research Brief will analyze in detail four of the sales mobility trends adopted by the strongest-performing sales organizations within Aberdeen’s research.

In January and February 2012, Aberdeen surveyed 250 end-user organizations about their sales effectiveness practices and accomplishments, specifically to understand how mobility is most effectively deployed. Key findings published in *Sales Mobility: How Best-in-Class Remote Sellers Are Replacing “See” with “Do”* (May 2012) focus on how the top 20% of performers – Aberdeen’s Best-in-Class cohort defined in the sidebar – have deployed specific sales practices in a mobile environment, which have help them achieve better business results. Figure I introduces these “smarter selling” techniques, discussed in more detail to follow, which are more heavily adopted by Best-in-Class firms than other companies.

**Figure I: Best-in-Class Protocols Supporting Sales Mobility**



Source: Aberdeen Group, February 2012

### Research Brief

Aberdeen’s Research Briefs provide a detailed exploration of a key finding from a primary research study, including key performance indicators, Best-in-Class insight, and vendor insight.

### The Sales Mobility Best-in-Class

In January and February 2012, Aberdeen surveyed 250 end-user sales organizations to understand how the top performers among them control their sales cycle and convert more leads into closed deals. The performance metrics used to define the Best-in-Class (top 20%), Industry Average (middle 50%) and Laggard (bottom 30%) among these sales teams are:

- √ 109% of overall sales quota achieved by the sales organization during the last completed calendar or fiscal year, compared with 73% among Industry Average firms and 41% within Laggards
- √ 8.1% year-over-year increase in lead conversion rate (sales-accepted lead to close); vs. a 2.1% increase for Industry Average firms and 6.1% decrease among Laggards
- √ 4.6% average year-over-year improvement in customer renewal rate, vs. a 0.3% improvement for the Industry Average and a 2.5% decline among Laggard respondents

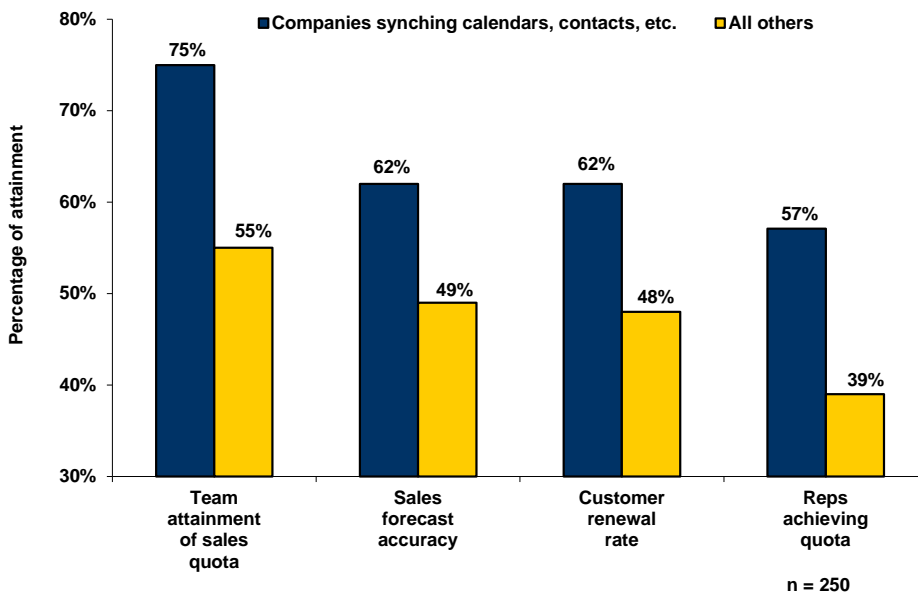
## Synchronization: Enabling Real-Time Team Selling

While 75% of all companies support the **synchronization of calendars, contacts, events and/or tasks**, the Best-in-Class firms are 24% more likely than all others (89% vs. 72%) to do so. With today’s complex selling environment – an average deal size of \$211k and typical sales cycle of 3.9 months among all respondents – requiring more team-based sales activities than ever, the down-time and confusion wrought by not keeping everyone’s activities thus aligned is a dangerous undertaking that should be avoided. The top performers mobilize this organizational capability (see PACE framework on the page 3 sidebar) in order to, simply enough, “get salespeople selling” by minimizing the back-and-forth communications required to schedule meetings, update account information and synchronize a well-coordinated plan of attack.

**Sector Definition: Sales Mobility**

For the purposes of this research, “sales mobility” refers to organizational support of sales and/or account management professionals whose work includes any component of out-of-office activity, including home, travel, at customer sites, etc. “Devices” can include feature cell phones, smartphones, or tablet/netbook/laptop personal computers. Finally, “sales staff” or “sales reps” refer to both direct outside/field sellers as well as account management personnel responsible for maintaining quotas.

**Figure 2: Synchronization of Calendars, Contacts, Events Pays Off**



Source: Aberdeen Group, February 2012

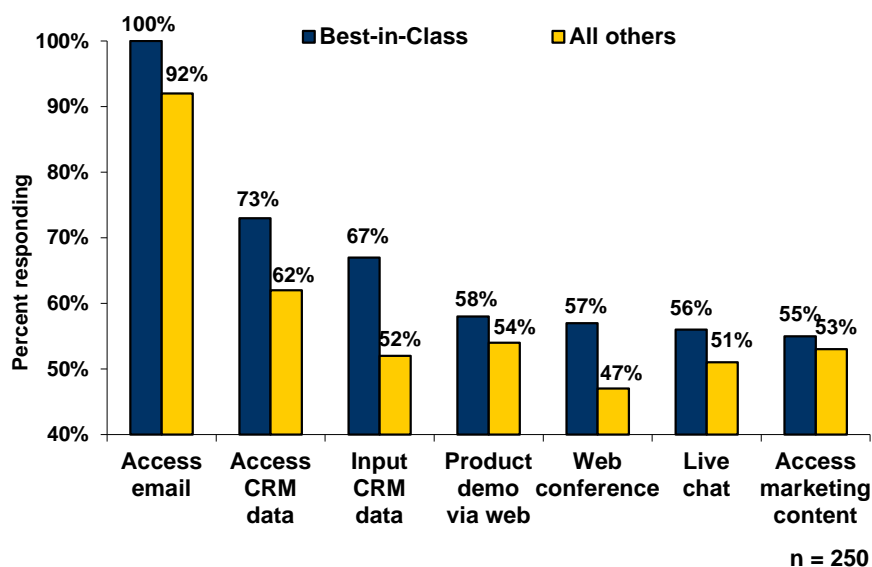
In Figure 2, we see that the current performance metrics around team/rep sales quota attainment, sales forecast accuracy (see [Sales Forecasting: How Top Performers Leverage the Past, Visualize the Present and Improve Their Future Revenue](#), July 2011) and customer renewal efficiency (see [Leveraging the 360 Degree Customer View to Maximize Up-Sell and Cross-Sell Potential](#), September 2011) are stronger among survey respondents who deploy this best practice, in comparison to those that do not.

## Leveraging Your CRM Investment More Fully Through Mobile Access

With the CRM platform widely considered the standard repository of customer, account and opportunity data, the **ability to remotely view and modify key CRM data such as accounts, contacts, leads and the**

**forecast** has far stronger adoption rates among Best-in-Class companies, contrasted with barely one-third of Laggards bothering to deploy this most basic of sales mobility protocols. The top performers better understand that real-time access to the vital information on their territory and accounts is a crucial enabler of sales effectiveness in a “do more with less” environment pressured by ever-increasing annual sales quotas. Figure 3 shows us that after email, these CRM functionalities are considered the most crucial use cases of sales mobility, and more so by the Best-in-Class than other firms.

**Figure 3: Crucial or Frequent Use Cases of Sales Mobility**



Source: Aberdeen Group, February 2012

A number of additional Best-in-Class trends around marrying sales mobility capabilities to the CRM deployment are worth noting:

- Fifty-eight percent (58%) of the Best-in-Class integrate their CRM system with all commonly-used mobile devices carried by their field sales staff, i.e. the CRM system is essentially device-agnostic. In comparison, 43% of Industry Average companies and 23% of Laggard organizations have so enabled their remote sellers with “anytime, anywhere, any device” freedom to prospect, sell, close and report effectively.
- Aberdeen research published in [Leveraging the 360 Degree Customer View to Maximize Up-Sell and Cross-Sell Potential](#) (September 2011) supports the value of integrating all enterprise silos of customer data in order to better provide customer-facing personnel with a unified, single view of their prospects and accounts, the better to market, sell or service them. In particular, integrating the CRM system instance with the Enterprise Resource Planning (ERP) system is helpful in streamlining conversations with customers; in the current [Sales](#)

**Aberdeen’s PACE Methodology**

Aberdeen applies a methodology to benchmark research that evaluates the business Pressures, Actions, Capabilities, and Enablers (PACE) that indicate corporate behavior in specific business processes:

- √ Pressures — external forces that impact an organization’s market position, competitiveness, or business operations.
- √ Actions — the strategic approaches that an organization takes in response to industry pressures.
- √ Capabilities — the business process competencies (process, organization, performance and knowledge management) required to execute corporate strategy.
- √ Enablers — the key functionality of technology solutions required to support the organization’s enabling business practices.

Mobility research, only 19% of companies have achieved this integration, but it is telling that the rates for individual maturity classes are: 27% of Best-in-Class, 19% of Industry Average, and 7% of Laggard companies. The top performers are clearly leading the way as early adopters of this sales enablement best practice.

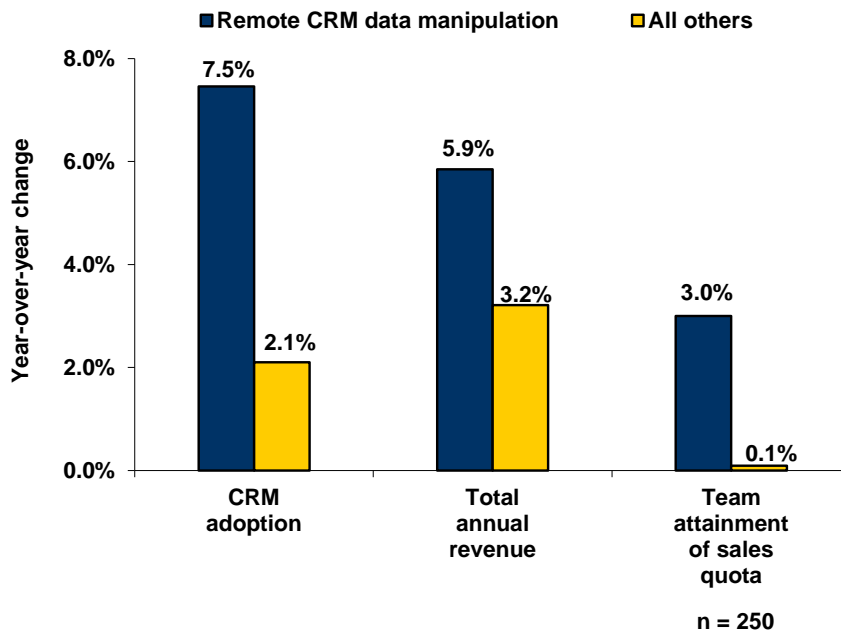
- Survey respondents who “Link CRM data entry to mobile communications activity (voice, email, text, web)” number 50% of the Best-in-Class, while 28% and 15% respectively of Industry Average and Laggard companies do so. It is crucial for field-based staff to be able to easily access and update CRM records remotely, lest they be forced to wait until day’s end; the latter scenario inevitably leads to lower rates of CRM adoption, less actionable data in the system, and more guesswork around forecasting revenue. Indeed, CRM adoption rose on a year-to-year basis by 6.8% among the Best-in-Class, compared with 6.1% among Average firms and just 2.5% within the Laggard cohort.

Finally, we analyze in Figure 4 the year-over-year change in CRM adoption, total corporate revenue and team sales quota attainment, comparing companies with remote CRM record updates with firms not offering this capability. Clearly it represents a better path toward maximizing overall sales effectiveness.

**Fast Facts: Sales Mobility**

- √ Best-in-Class firms expect more from their sales reps, with a \$932k average annual sales quota, versus \$669k and \$621k for Industry Average and Laggard companies respectively.
- √ Sales compensation is higher among the Best-in-Class, with a fully-loaded average of \$131k annually; Industry Average and Laggard companies provide \$95k and \$90k respectively.
- √ Forty-eight percent (48%) of the Best-in-Class anticipate additional sales mobility investments within the next 12 months; other companies show a 34% rate.

**Figure 4: Remote CRM Access Associated with YOY Success**

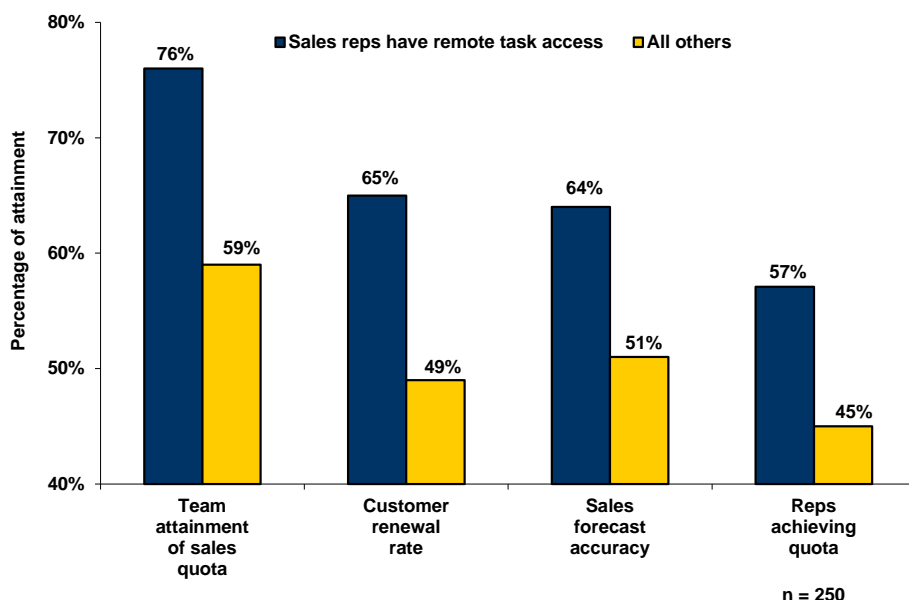


Source: Aberdeen Group, February 2012

## Best-in-Class Remote Sellers Replace “See” with “Do”

When it comes to **accessing/performing/modifying business tasks remotely**, nearly three-quarters of Best-in-Class companies enable their sales teams by streamlining their daily activities, while fewer than half of Laggards do the same. Noting that survey respondents studied for [Sales Performance Management 2012: How the Best-in-Class Optimize the Front Line to Grow the Bottom Line](#) (December, 2011) reported an average of 40% of their professional, Business-to-Business (B2B) sellers working primarily on a remote basis, it is clearly a necessity, rather than a luxury, for contemporary sales leaders to ensure that sales reps and account manager can do their job anywhere, any time, and via any device.

**Figure 5: Anywhere, Any Time, Any Device - Enabling the Remote Seller**



Source: Aberdeen Group, February 2012

In Figure 5, we see that the smart money is on joining the adopters of this best practice, with current Key Performance Indicators (KPIs) stronger for such companies, when compared with the minority (43%) of survey respondents that are not currently enabling their front-line personnel accordingly.

## It’s All About the Customer

The Aberdeen research referenced above on [Leveraging the 360 Degree Customer View to Maximize Up-Sell and Cross-Sell Potential](#) (September 2011) featured a Best-in-Class cohort defined by outstanding performance in customer retention, shortening the sales cycle, and improving team attainment of sales quota. Ninety percent (90%) of these top performers indicated that “sales contact, opportunity and pipeline information is entered and updated

### Fast Facts: Sales Mobility

- √ Best-in-Class firms report that 79% of their sales reps are currently achieving annual sales quota, compared to 55% among the Industry Average and 32% within Laggards.
- √ The average lead conversion rate – a lead accepted by “closers,” from inside sales or internal/external lead generation provider, yielding a closed deal or account win – is 38% among the Best-in-Class, and 18% among all other firms.
- √ Annual revenue grew 16.7% on a year-over-year basis among the Best-in-Class; Industry Average firms saw a 4.6% increase while Laggards averaged a revenue decline of 6.2%

on a regular basis,” compared with 69% of other firms. Thinking logically about these heavy adoption rates, and the percentage of contemporary sales reps indicated above who primarily work outside the office, leads us to a natural conclusion: viewing, updating and working with an accurate and up-to-date customer record within the CRM system is essential for remote staff to acquire and service customers effectively. In the current [Sales Mobility](#) research, Best-in-Class companies are 71% more likely than others (58% vs. 34%) to support this protocol, the approach is fairly common-sense among top performers but only an afterthought among less strategic sales organizations. Simply put, if sales staff are expected to keep prospect and customer records up-to-date in the CRM system or any other system, easing their ability to do so remotely will likely promote more accurate and timely entry of the data. Table I summarizes a significant number of sales effectiveness KPI’s, both current and year-over-year performance metrics, in which adopters of this capability out-shine non-users.

**Table I: Leveraging the 360° Customer View from the Road**

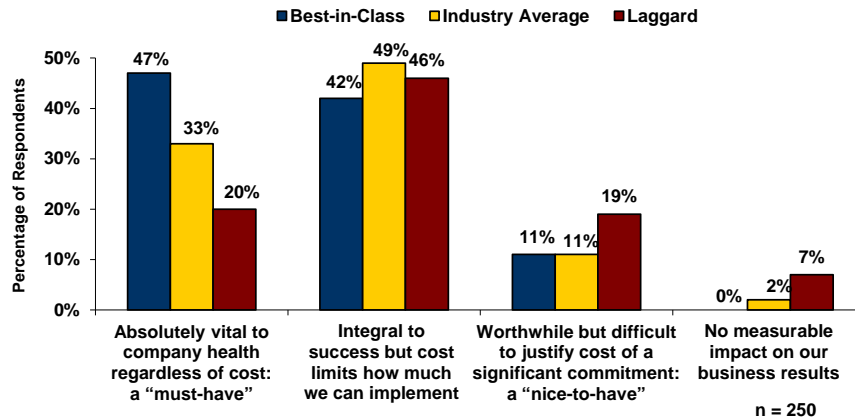
Sales Effectiveness Metric	Companies able to Remotely View/Modify all Customer Data	All other companies
Team attainment of annual sales quota	76%	64%
Sales forecast accuracy	65%	54%
Customer renewal rate	62%	54%
Reps achieving annual sales quota	54%	49%
Average lead conversion rate	27%	46%
Average sales employee turnover	13.3%	16.4%
CRM adoption (year-over-year change)	8.0%	3.3%
Total revenue (YOY)	6.7%	3.3%
Team quota attainment (YOY)	3.2%	0.3%
Improvement in (reduction of) sales cycle (YOY)	0.4%	-2.2%

Source: Aberdeen Group, February 2012

## Conclusion

Just as any contemporary sales rep knows they need to promote their product or solution as more of a “must-have” than a “nice-to-have,” the corporate backbone supporting these same reps often involves the same decision. In this case, survey respondents were asked, on a 1 to 4 scale, how important sales mobility was to their overall corporate success. In Figure 6, the overall popularity of “must-have” is strong, but particularly among the Best-in-Class, far fewer of whom indicate little or no impact of sales mobility on their business accomplishments.

**Figure 6: Impact on Business: Just How Important is Sales Mobility?**



Source: Aberdeen Group, February 2012

The lessons here are clear: with more sophisticated sellers, devices and customers, the need to truly “cut the cord” for field-based personnel and account managers, particularly around fully accessing the CRM investment, remains a strong Best-in-Class initiative. For more information on this or other research topics, please visit [www.aberdeen.com](http://www.aberdeen.com).

**Related Research**

[Sales Mobility: How Best-in-Class Remote Sellers Are Replacing “See” with “Do”](#) (May 2012)  
[Lead-To-Win 2012: Managing People, Process and Technology to Optimize the Last Mile of the Sales Cycle](#) (March 2011)  
[Partner Relationship Management: Channeling Better Sales Results](#) (March 2011)  
[Sales Performance Management 2012: How the Best-in-Class Optimize the Front Line to Grow the Bottom Line](#) (December 2011)

[Sales Training 2011: Uncovering How the Best-in-Class Sustain, Reinforce and Leverage Best Selling Practices](#) (October 2011).  
[Leveraging the 360 Degree Customer View to Maximize Up-Sell and Cross-Sell Potential](#) (September 2011)  
["Chance Favors the Prepared Mind" - Understanding the Science of Sales Intelligence](#) (July 2011)  
[Sales Forecasting: How Top Performers Leverage the Past, Visualize the Present, and Improve Their Future Revenue](#) (July 2011)  
[Streamlining the Top of the Funnel: How Inside Sales Teams Source, Qualify and Close Business](#) (February 2011)

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