Unlock the value of your SFA/CRM system:

Leverage analytics and mobile apps to boost sales productivity.
Executive summary

In today’s competitive business environment, corporate leaders are routinely called upon to make rapid and crucial decisions. Top managers realize that to stay ahead of the market and the competition, they must be able to efficiently access company data anytime, anywhere. Advanced business analytics and mobile applications make this possible. These tools have begun to eliminate the previous challenges associated with accessing, visualizing, and analyzing data wherever you may be, allowing you and your sales team to maximize your company’s sales potential. In this white paper, we will explain how this is accomplished.

With advances in business intelligence (BI) tools, data stored in Sales Force Automation (SFA) and Customer Relationship Management (CRM) systems can be analyzed in a multitude of ways. For example, your sales and marketing teams can identify sales trends, answer crucial client questions, and allow real-time mobile selling. By using these applications to their full potential, your company can stay on top of sales cycles, contacts, and pipelines, leading to increased revenue growth.

To unleash this potential, four key SFA and CRM challenges must be targeted:

• Difficulty getting the data needed to effectively run your business.
• A lack of advanced analytical capabilities.
• A weak set of standard visualizations.
• Incomplete field access to valuable sales resources.

By overcoming these four challenges, you will get the most from your SFA and CRM data and increase the return on investment for these systems. Information that was once used exclusively for basic sales, marketing, and customer service processes will be accessible for visual analysis by all departments, improving forecasts and optimizing resources.

This white paper will articulate how to quickly address these four challenges. It will further explain how businesses are using interactive dashboards, stunning visualizations, and superior analytics to improve performance and rise above their competition. Lastly, it will illustrate how the addition of mobile applications dramatically increases the use of SFA and CRM platforms, maximizing sales representative productivity.

The four challenges of SFA and CRM systems

Challenge 1: Difficulty getting the data you needed to effectively run your business

Your latest product line is selling out in Paris, but inventory is stagnant in Vancouver. Demand has been growing in Tokyo and slowing in London. At times like this, you need comprehensive data that can help you draw meaningful insights. You must be able to tap into historical CRM data and other data sources on supplies, marketing, and markets. Comprehensive data from a variety of sources allows you to examine market changes over the past year, helping you understand how to reallocate resources to control or reduce expenses and maximize sales.

Getting all the information you need to run your business has been a challenge, commonly due to (1) SFA and CRM capacity restraints where additional storage is usually sold at a premium and (2) attempting to synchronize tools that were not built for integration with one another.

Without the ability to consolidate information from different sources and access historical information, the risk for data latency, inaccessibility, and inconsistency grows. Unreliable and incomplete data degrades sales reps’ and managers’ abilities to skillfully analyze sales, customers, competitors, and industry trends. Independently accessing various silos of information wastes resources and makes it difficult to carry out decisions based on a holistic view of enterprise data.
Business analytics tools enable you to visualize and drill into comprehensive data to pinpoint sales trends and answer complex questions, such as:

- Do specific industries respond to certain products?
- Can I predict sales related to seasonality?
- Are there competitors we are losing to in specific industries for specific application areas?
- What is the true profit and loss for sales territories?

Advanced business analytics tools can help you overcome known challenges with SFA and CRM systems to assist you in answering the business questions that matter. They ensure reports and dashboards are dependable, so different teams can collaborate and have productive conversations with one another, and with customers. All departments and clients can be comfortable knowing that their data is comprehensive and consistent. This facilitates cooperation and drives higher close rates, ultimately helping your organization grow.

**Challenge 2: A lack of advanced analytical capabilities**

Friday morning you receive a summary of the latest sales forecast report, which includes sales quota and actual sales data. It appears that sales are slowing. At this rate, you might not meet your quota this quarter. You drill into the actual-versus-forecasted sales report for a break down of figures by individual sales representatives. From there, you can drill across to view the sales pipeline of a particular rep. It is possible that someone is not receiving the support he or she needs in order to close an opportunity.

SFA and CRM tools are unable to support this type of predictive analytics and drilling. With the addition of leading business analytics tools, you now have access to the advanced analytics needed to resolve complex questions and anticipate trends.

There are two areas in particular where SFA and CRM systems fall short:

1. **Advanced and predictive analytics**—Advanced and predictive analytics give business users and data analysts full investigative power into all aspects of an organization’s data. Sales teams are able to gain new and deeper insights into their accounts. Lead scoring models help organizations identify accounts most likely to close so appropriate resources can be reallocated.

2. **Online analytical processing (OLAP)**—SFA and CRM tools do not deliver when it comes to OLAP-style analytics. OLAP capabilities, such as slicing, dicing, and drilling, are often limited (or in some cases nonexistent), which means that organizations are unable to extend their analyses into every corner of their data warehouse. Sales managers need the ability to look at a regional dashboard and drill across to product-level data. This capability can help them grasp how varying levels of product demand may be affecting revenue in particular regions. This type of understanding is crucial to optimizing earning potential.

Integrating a business analytics platform with your SFA and CRM systems empowers you with the predictive analysis needed to make quick and impactful decisions.

**Challenge 3: A weak set of standard visualizations**

As part of a new upsell program, you need to investigate product performance and identify growth opportunities. You bring up a dashboard containing cutting-edge maps, allowing you to perform white space analysis. It is apparent that there are untapped sales opportunities in Southeast Asia. You drill into Southeast Asia and the surrounding regions to interpret buying patterns within existing accounts. An advanced graph matrix helps you identify products not being sold, and network visualizations help you with affinity analysis.

The best way to understand your data is to visualize it, but SFA and CRM systems provide a poor set of standard visualizations. The visualizations are usually limited to static bar and pie charts.

A comprehensive business analytics platform can provide a rich library of advanced visualizations, including maps, networks, and graph matrix visualizations. Users can interact with their visualizations and change them as they see fit. With a business analytics platform, every user has the power to be a professional data-journalist.

**Challenge 4: Incomplete access to valuable sales resources in the field**

You have finished your afternoon sales presentation and the client is ready to sign a new deal. You present her with the agreement and get her signature on your tablet. With time left in your day, you access the GPS data in your mobile app to find another nearby prospect. After a stop to introduce yourself and your new product line, you finish the day at the airport gate. There, you use your tablet to enter
the latest opportunity or account data into the company SFA and CRM systems, create presentation visuals for an upcoming meeting, and map out travel for the week. Sophisticated mobile apps make these tasks all possible.

Tablet devices have ushered in a whole new era for field sales. Many of their inherent features, such as intuitive touch-screen displays, instant on, long battery life, GPS, and 3G/4G Internet access become powerful tools when combined with the sales-focused business apps that run on them.

Some businesses are reluctant to move forward in developing a mobile strategy because they have invested heavily in an SFA or CRM system for which they have yet to realize the anticipated ROI. Ironically though, mobile sales apps—which are sometimes incorrectly perceived as an extraneous investment—boost ROI on existing investments.

Mobile apps boost sales rep productivity and improve customer engagement by providing compelling intelligence and visualizations. Sales reps and clients are able to easily interact with data on a mobile device, creating an enjoyable and engaging experience. When combined with SFA, CRM, or other sales-related data, mobile apps give reps a complete toolkit for projecting a cutting-edge appearance in front of customers and working optimally in the field.

With sophisticated mobile apps, business moves in real time. Sales professionals with mobile access have a constant connection to data and analytics, multimedia content, market intelligence, and product information. This makes it possible to create engaging presentations and answer client questions on the spot.

**Unlock the value of your SFA and CRM with MicroStrategy**

Business analytics and mobile solutions, such as those powered by MicroStrategy’s Analytics and Mobile Platforms, help organizations overcome the four challenges outlined here. They protect and enhance SFA and CRM investments. They deliver deep insights with interactive reports and dashboards containing comprehensive data, superior analytics, and stunning visuals. Simply put, they radically improve your organization’s performance and revenue growth.

In addition to increasing the ROI of SFA and CRM systems, MicroStrategy’s Analytics and Mobile Platforms integrate seamlessly with your existing systems. This frees up money and IT resources for use on other high priority projects. MicroStrategy’s out-of-the-box connectors to SFA and CRM systems, like Salesforce, ensure an easy, seamless integration with no custom coding required.

Once connected, organizations can rapidly build and deliver reports, dashboards, and mobile apps using all their relevant enterprise data.
data. The MicroStrategy Platform employs a unitary architecture designed organically from the ground up, offering the ability to build reports or dashboards once, deploying them anywhere—web, email, mobile, and within documents. Everyone, from sales representatives in the field to the President of Sales, can access consistent and reliable reports and dashboards.

The MicroStrategy Analytics Platform also provides robust advanced analytics that enable complex questions to be answered. Out-of-the-box access to over 300 functions allows users to perform more complex analytics as their analyses mature and needs change—functions like data summarization, trend analysis, benchmarking, relationship analysis, and projections.

For the most complex questions, MicroStrategy also has a tight integration with R, an open source, statistical programming language. Drill-anywhere capabilities give users unlimited and immediate investigative analysis. Users can drill to any corner of their data warehouse. These capabilities power sales teams to perform advanced calculations.

MicroStrategy’s stunning data visualizations help you come to conclusions quickly and intuitively. These visualizations go beyond the traditional bar graphs and pie charts to advanced network visualizations, graph matrices, geographical maps, and more. Users can access and combine hundreds of data sources and build dashboards containing several visualizations to perform comprehensive data discovery.

With MicroStrategy Mobile, you can deploy dynamic native Mobile Sales Enablement (MSE) applications that bring together analytics, rich multimedia content, and write-back transactions. Since connectivity in the field is not always guaranteed, MicroStrategy Mobile apps provide online or offline access to all your important sales information and tools.

MicroStrategy empowers you to maximize your sales organization’s potential and improve business growth by unlocking the full potential of your SFA or CRM systems. Ultimately, your business can deliver deeper insights and answer the important questions needed to increase revenue growth.