



A guide to mobile CRM



If you've downloaded this guide, chances are you're either thinking about investing in a mobile CRM or considering changing vendors. The problem is, deciding which product to invest in is daunting when so many options are available.



We're here to give you the information you need to make your own informed decision. In this guide, you'll learn the benefits of using a mobile CRM and find out how to use one (based on top use cases), as well as how to choose the right mobile CRM for your team.

Let's dive in.

4 key benefits of a mobile CRM

Understanding your customers' needs is the key to success in sales. CRMs make it possible to gain this knowledge by providing reps with an organized, easily accessible, all-in-one platform for customer management.

The problem is, not all sales reps spend their day in front of a computer, so they can't always connect with leads as soon as they're ready to make a purchase. Mobile CRMs make it possible to manage deals and customer data from anywhere, at any time. And this level of responsiveness comes with a number of key benefits.

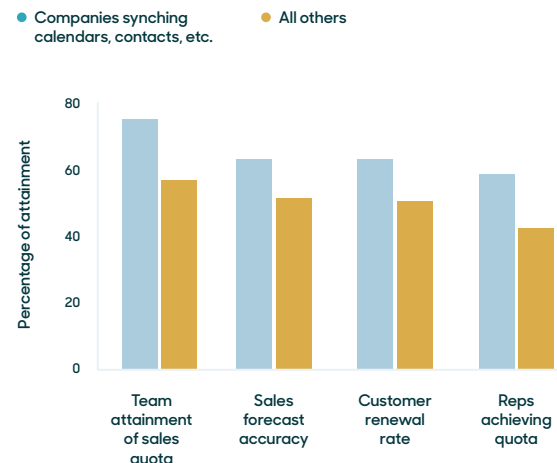
1. Higher rate of quota attainment

In a [study by the Aberdeen group](#), sales reps who used mobile CRMs were **12% more likely to achieve their individual sales quotas (YoY)** than reps who did not. The ability to sync contacts, events, and calendars to a rep's phone minimized the back-and-forth needed to schedule calls and update account information. It also reduced the chance a rep might forget to update customer information and, as a result, lose a sale.

By synchronizing information, mobile CRMs allow reps to work more efficiently as a team and collectively achieve higher quota attainment.

Synchronization of calendars, contacts, events pays off

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2. Improved sales productivity

A [Nucleus Research survey](#) found that mobile CRM adoption [improved sales productivity](#) by **14.6%**.

If a rep's ability to manage their pipeline is limited to what they can do on their computer, productivity will likewise be limited. Many of today's mobile CRMs are capable of the same functions as their desktop counterparts.

When your reps can manage their entire workflows from their phones, they can be productive every second of the day, regardless of where they are.

3. Higher customer retention rate

Sales teams who used mobile CRMs had a [16% higher customer retention rate \(YoY\)](#) than teams who did not. Why? Because mobile CRMs allow reps to manage and access customer data from anywhere.

Say, for example, a rep is away from their desk when a customer reaches out about a problem with their order. With a mobile CRM, that rep wouldn't have to

wait until they get back to the office to assist the customer. They could pull up the customer's order and information right from their phone and solve the problem quickly.

Responsiveness through mobile CRMs results in positive customer experiences, which naturally leads to high retention rates.

4. Shorter sales cycle

In [2015, Nucleus Research found](#) that a rep's mobile access to data helped **shorten their sales cycle by an average of 8-14%**.

The ability to manage your pipeline, customers, prospects, and deals at all times makes 24/7 productivity possible. The more tasks you can manage on the go, the faster you'll be able to accomplish them and shorten the sales cycle.

The benefits of a mobile CRM are clear: if you want to take advantage of this tool, the next step is to learn how to use a mobile CRM.



4 main use cases of mobile CRMs

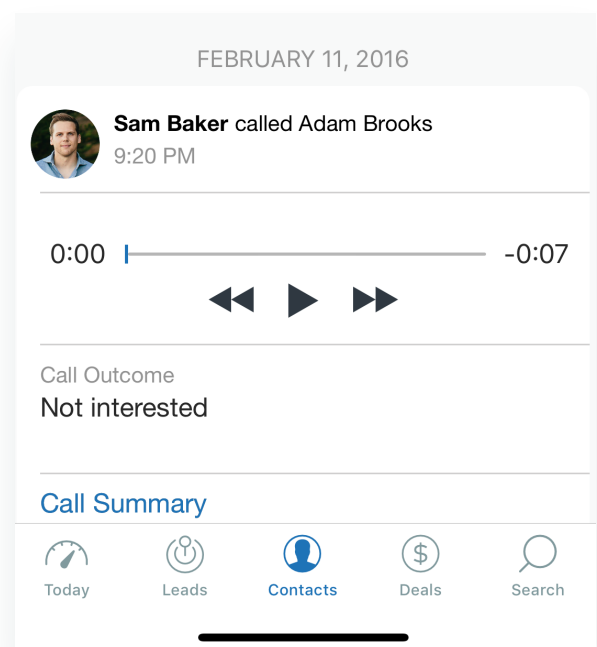
You've learned about the strengths of mobile CRMs. Now, it's time to cover what this tool looks like in practice for sales reps. Use this list to envision how a mobile CRM could best improve your workflow.

1. Integrated calling

Many mobile CRMs are equipped with an integrated calling feature that allows reps to send and receive calls directly from the app itself.

With this feature, mobile apps can recognize incoming calls based on the contact information saved in your CRM database. Even if a contact isn't saved on the phone, reps will be able to see who's calling from their database.

As a part of integrated calling, some mobile CRMs also include voice-recording features, enabling you to relisten to past conversations. Simply put, integrated calling capabilities make customer calls more productive and efficient.



2. Outside sales

Organizations that take an [outside sales](#) approach benefit from CRM's geolocation services, which allows field reps to view their prospects and customers on a map.

Using this feature, reps are able to see which customers they have or have not visited at a glance, ensuring no sales opportunities are missed.

Geolocation also recognizes when a rep comes within a certain distance of a customer's location. Once a visit has taken place, that location is tagged as complete. This allows reps (and their managers) to keep track of completed tasks.

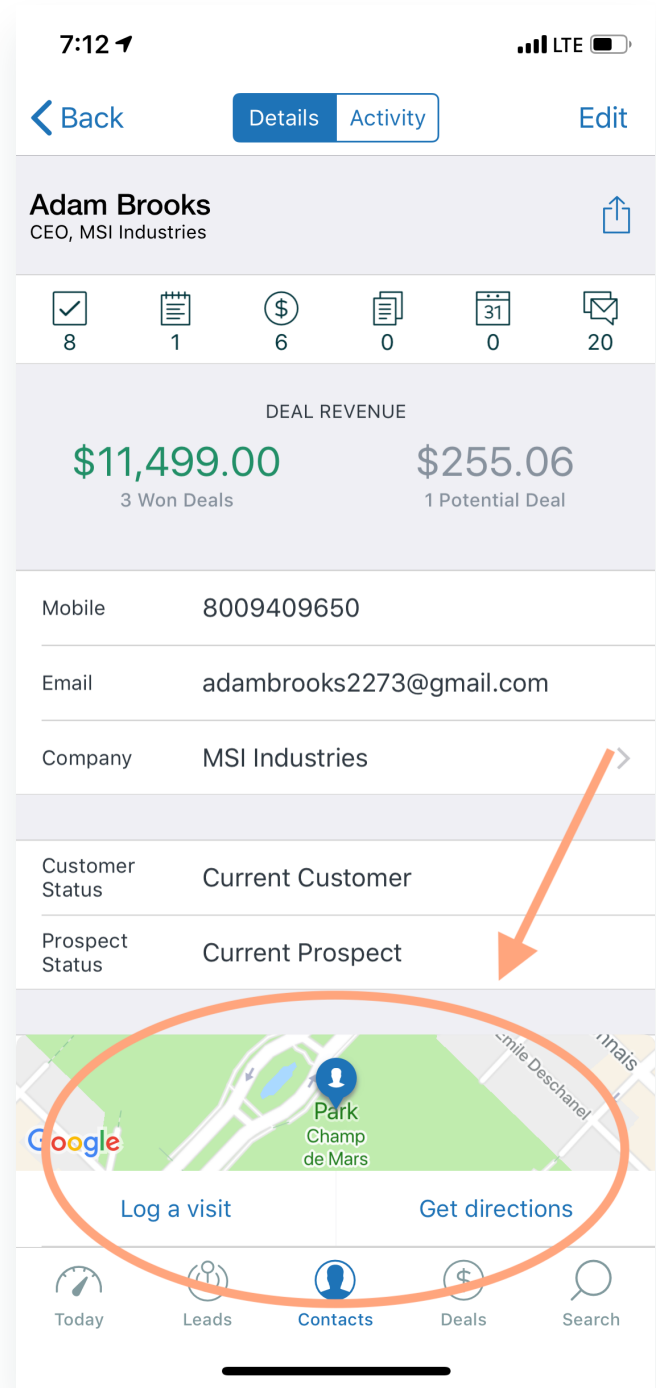
3. Offline data management

Some mobile CRMs are equipped with offline capabilities. When enabled, reps can access and update customer information even when they don't have an internet connection. This comes in especially handy for field reps who lose service while visiting their customers.

4. On-the-go task management

Mobile CRMs allow reps to manage their tasks, pipeline, and deals on the go. They don't have to wait until they're back in the office to complete any responsibilities. This eliminates the risk of forgetting a task and allows reps to stay productive regardless of their location.

If your reps struggle with any of the processes above, a mobile CRM could be exactly what they need to overcome their challenges.



Which mobile CRM features should I look for?

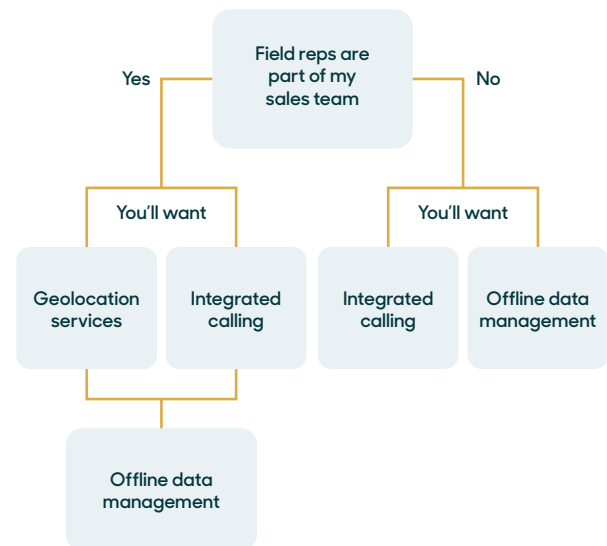
You shouldn't choose a CRM just because it has more features. Plenty of mobile CRMs can do everything, but few can do everything *well*. Instead, it's better to look for mobile CRMs with specific features that your team needs.

Ask yourself the following questions to determine which features are essential to you and your team. From there, you can choose a product that fits those needs.

Are outside sales (field reps) part of my business?

As we discussed earlier, geolocation services are beneficial primarily to field reps. Salespeople who rarely (or never) travel to their customers are unlikely to need map and location services.

That said, offline data management and integrated calling can benefit any salesperson to a certain degree, regardless of the type of sales they do. After all, most salespeople are going to interact with customers over the phone at some point, and every salesperson relies on accurate information to close deals.



How many employees do I have?

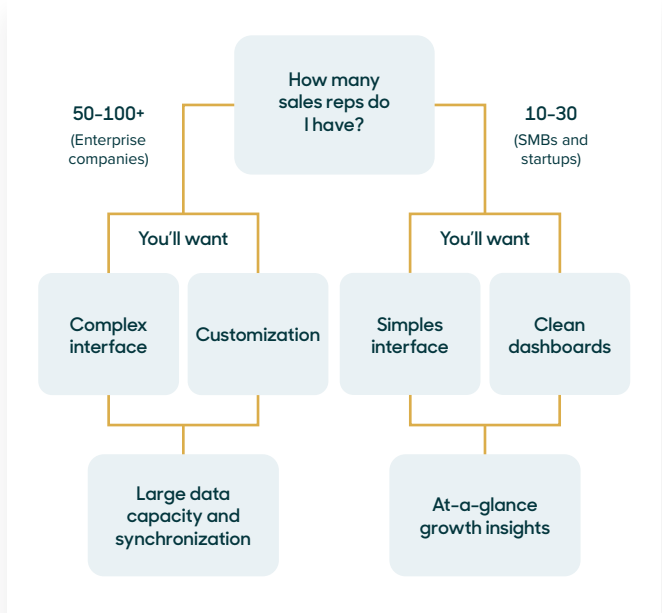
Large enterprise companies are likely going to have lots of customers, which means large quantities of data to manage. They're also more likely to have complex systems already in place upon implementation of a mobile CRM.

If your company falls into this category, you'll want to choose an app that can quickly sync large quantities of data between your database and your employees' phones. Consider searching for "mobile CRMs" on a site like G2 and filtering by ["Enterprise."](#)

Customization features, such as customer lists and pipeline organization, will also be valuable to your team. That way, you can more closely match your extensive, unique pipeline with your mobile CRM interface, making for a smoother onboarding process.

On the flip side, SMBs and startups tend to prefer simple interfaces. As a growing company, you're generally focused on improving a few specific aspects of the sales process, such as lead generation, conversion rate, growth, and revenue. A cleaner, less complex mobile CRM dashboard allows SMBs and startups to focus on the metrics and systems they care about most, without having to search for them.

Your mobile CRM requirements may change as your company grows. Focus on the challenges your team currently faces today, but keep in mind how they may differ 3-5 years from now. This will ensure the mobile CRM you choose remains beneficial in the long run.



Improve your sales success rate with a mobile CRM

In the sales world, staying one step ahead of the competition means being there for your prospects and customers *at all times*. Mobile CRMs give sales reps the ability to be this responsive. No matter where they are, your reps can instantly manage their deals, pipeline, and customer data with ease.

If you're ready to invest, keep this guide handy as you explore different CRM options. While the number of products out there may be overwhelming, our guidance on features and use cases will help you find the best mobile CRM for your team's needs.

To learn more about sales CRM that can enhance productivity, processes, and pipeline visibility for sales teams, head over to [Zendesk Sell](#).

