

Introduction

100+ Amazing things you can do with Greentree Software on your phone and tablet

Why did we make this book?

When we started working on this book, we had two goals in mind:

1. We want to show people how cool a mobile CRM client really can be
2. We want to provide a list of cool things you can get inspired by

Every day, we are approached with the question: "So, what can the app do?"

And it's really hard for us to spill the answer in one breath. There's just so much you can talk about. It's not a question of 2-3 benefits, there's hundreds of them!

Therefore, we decided to put it all on paper (electronic one) and put it out there—to intrigue and to educate.

Whether you are new to Mobile CRM, or you have already adopted it, this book will help you find out more about this topic. We wanted to provide you with a

complete resource of things you can do with a CRM on your phone or tablet.

Often it's hard to shout out every single thing via a website or on a blog—it can also be often overlooked. So an e-book seemed a very efficient way to get the info out there. It allows you to read the whole thing or just skim through the parts that catch your eye.

Either way, hopefully, while browsing through this book, you'll stop and say: "**Wow, I didn't know we can do that! How cool is that?**" And that's exactly what we wanted to accomplish.

Who is this book for?

This book was written for the Greentree Software ecosystem. Namely:

- Companies looking for a mobile client for Greentree Software
- Greentree Software consultants who want to extend their knowledge in the area of mobility
- Existing Resco Mobile CRM customers and partners
- Competition in the Mobile CRM market—let's improve together for the benefit of the customer

While writing this book, we tried to keep things **simple**. Meaning we tried to describe everything in a very conversational tone of voice, so everyone can easily follow the topics and remember them for later.

We avoided, or tried to avoid, technical terms that only a small portion of the CRM community understands. Why? Because we think CEOs, Sales Directors, Field Managers, Account Executives and Marketing Specialists should also be able to see the business opportunities Mobile CRM has to offer.

That being said, we are not excluding technical folks out there. They'll be able to go through this book and while reading things like "Find contacts on LinkedIn", their minds might immediately translate the title to "pass field parameters in a URL".

If you find yourself wanting to implement a certain aspect and not knowing how because of lack of technical description in this book, just reach out to our support team via e-mail. They'll know exactly all the technical details behind each feature covered in this book.

This book will answer these questions for you:

1. What are the benefits of mobile CRM?
2. Does it pay off to invest in a mobile CRM solution?
3. How can we use a CRM app in our scenario?
4. How can we improve our current mobile solution?
5. What is there to know that I don't know yet?



Section 1

Access to vital information

100+ Amazing things you can do with Greentree Software on your phone and tablet

#1

Get access to Greentree Software from a phone or a tablet

Let's start with the basics. Having access to your CRM system from a phone or a tablet is, of course, the most obvious benefit of any mobile CRM solution. But let's take a moment to appreciate truly its benefits.

Mobile CRM will give you around-the-clock access to your CRM system, so you can be productive whenever and wherever you happen to be. With Greentree Software in your phone and tablet, you'll have the info you need with you at all times. You'll be prepared for every sales pitch, every call or even an unexpected meeting.

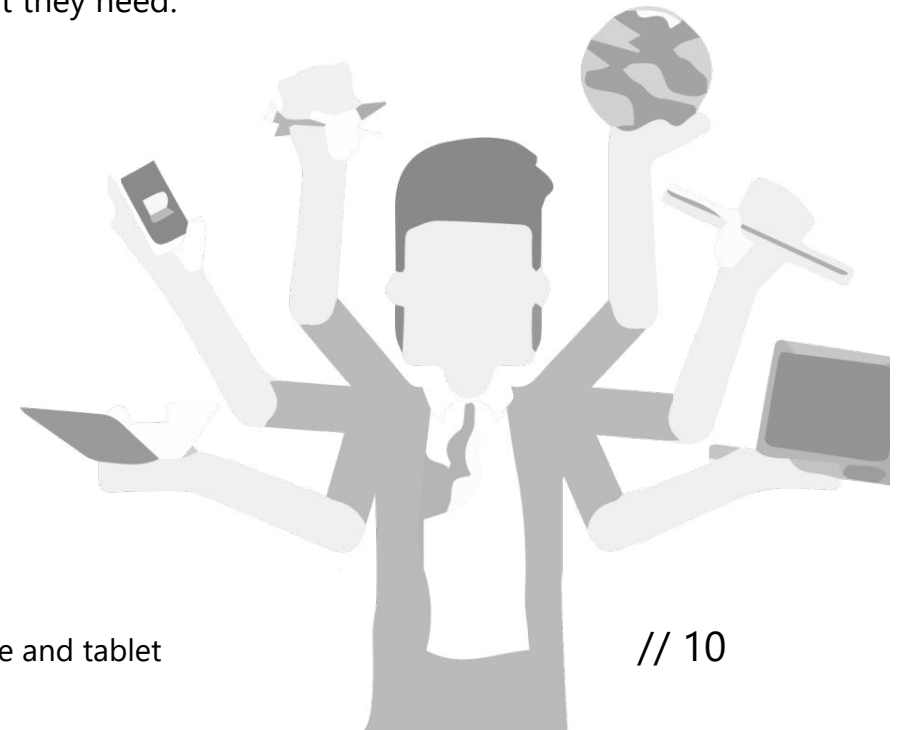


#2

Change the way you work. For good.

Ditch the computer and free yourself from a static workplace. Meet customers where they are. That's where the real action is.

This possibility to access the desired information whenever you want will greatly ease your job. You can work with your data wherever the road takes you. Your prep time for meetings will be significantly reduced. It will become only a matter of a few clicks right before the meeting starts—you'll have a perfect overview of the client, the details on previously discussed topics and information on what they need.



#3

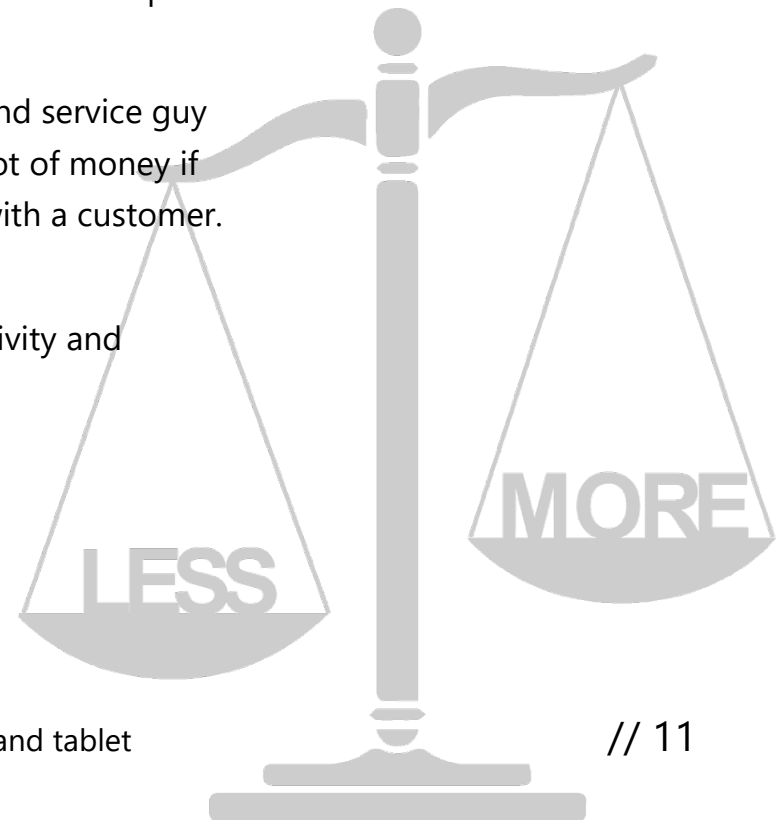
Increased productivity with less effort

Working with your smartphone or tablet is both, easy and fast. Your job will be done in a fraction of the time you are used to and you'll have spare time for the important stuff.

One of the reasons why mobile devices increase efficiency is that we can use them when either traveling or waiting for on-site meetings. We can simply use the spare time to enter the data or send a follow-up.

Some of our Resco Mobile CRM customers told us that each sales and service guy now saves around an hour or more a day. A whole HOUR! That's a lot of money if you picture it as a portion of their salaries. That hour can be spent with a customer. And that's what makes the difference.

Mobile CRM is an investment. An investment that increases productivity and facilitates faster and more informed decision-making.



#4

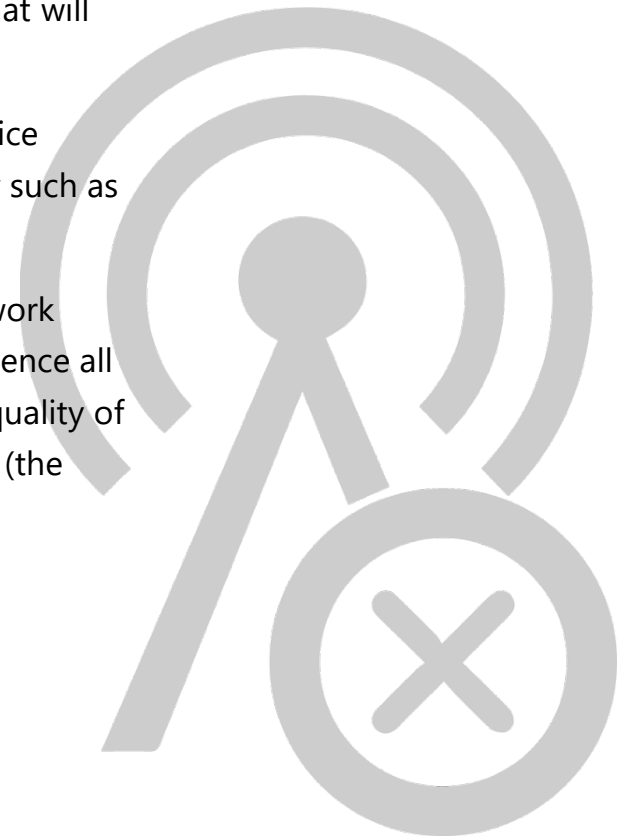
Work smart, work offline

Who needs to work offline in this era of wide Internet coverage, right?

Well, you can't always rely on having uninterrupted Internet access. Occasionally, there will be underground parking lots, rural areas, even some buildings that will prevent you from accessing your CRM data when you need it the most.

Offline capability means you are working with the data stored on your device (tablet or phone). You can view, edit and manage the data, so functionality such as *'qualify a lead'* or *'create an order'* is not lost to you.

Besides, online access isn't that great as it pretends to be. Whenever you work online, you are connecting to a remote database (located on the server). Hence all data operations are slower, costlier and potentially risky (depends on the quality of the Internet connection). Online working leads to increased Internet traffic (the same data is sent back and forth again and again), the not-so-optimal responsiveness of the application and shorter battery life.

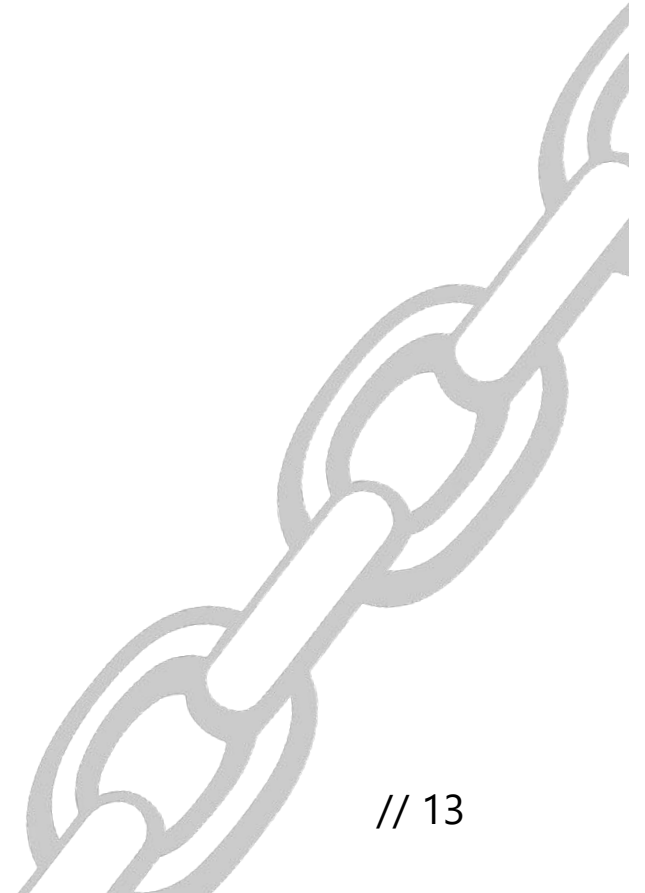


#5

Stay on top of the food chain

It's a jungle out there! Your competitors are after the deals you'd like to win. Your customers expect a faster and better service... Unless you have the technology, it's going to be hard to keep up.

During the first half of the 20th century, firms used to track the sales with pen and paper. Because knowing the customer data did, does and will shape the business. Later on, the Rolodex, a desk accessory with a unique ability to spin through index cards was used by tons of businesses. It may sound ridiculous nowadays, but Rolodex would allow you to add customers while updating existing customer information, details and more. Useful, but once you start growing, no Rolodex in the world can save you. So CRM on desktop computers came to be and that was great. But times have changed and now tablets, phones, and wearables are taking the center stage.



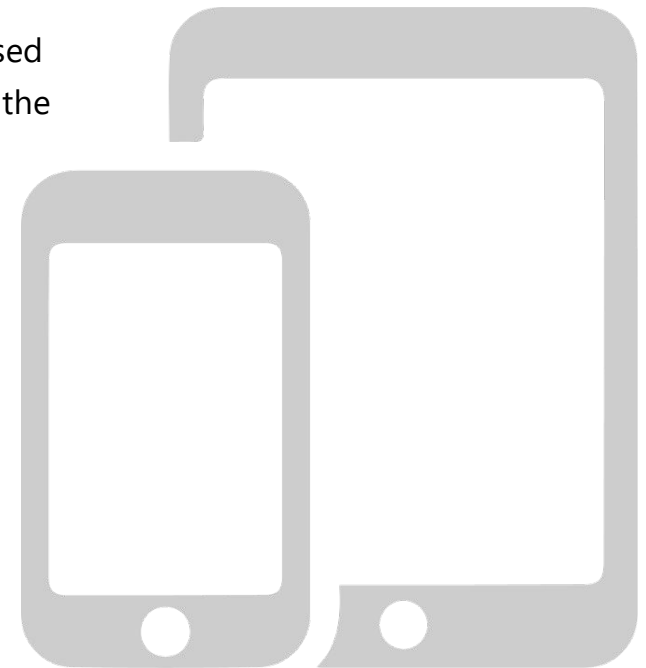
#6

Tablet or phone? Why not both?

You can use as many smartphones or tablets as you wish to (or more likely - as many as you have). Want to make phone calls from a smartphone, but create orders on your tablet? Go ahead.

But aren't tablets and phones just expensive toys?

It's easy to assume that phones and tablets given to employees will be mainly used for non-productive activities such as gaming, social media, YouTube... But given the opportunity, employees prove time and time again this assumption is just plain wrong. People value the investment in them, plus they find Mobile CRM really useful. And if something is useful to you, you are likely to use it.

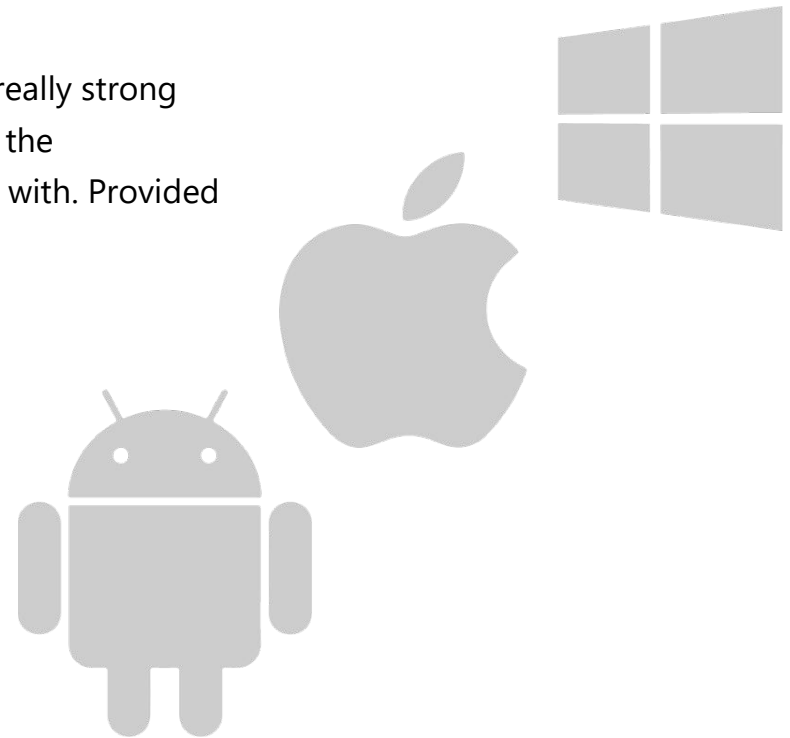


#7

Take your pick

Deciding what smartphone or tablet to buy next? Feel free to choose whichever. Your CRM app will work on all because Resco Mobile CRM is platform independent. Which is really just a fancy way of saying it works on iOS (iPhone & iPads), Android and Windows-powered devices.

People are used to certain systems. Hell, they even sometimes have really strong opinions when it comes to which one is the best. But let's not stir up the conversation. Everyone can have what they like and feel comfortable with. Provided it's not Blackberry. In that case, it's time for a change.



#8

Leave your worries behind

Having your Greentree CRM data in a mobile app can be a scary thing. After all, how

sure can you be your data is safe?

Pretty sure actually. We go above and beyond to ensure your information is safe & secure. From securing the database with the highest encryption standard to giving you the option to lock the application or wipe out data from it should something unexpected happen. And you can do it all remotely, fortified with push technology.

Still not convinced? There's always the option to opt for a Mobile Device Management tool (like MobileIron) that will take control of what's happening to your data at all times.





Section 2

Sales

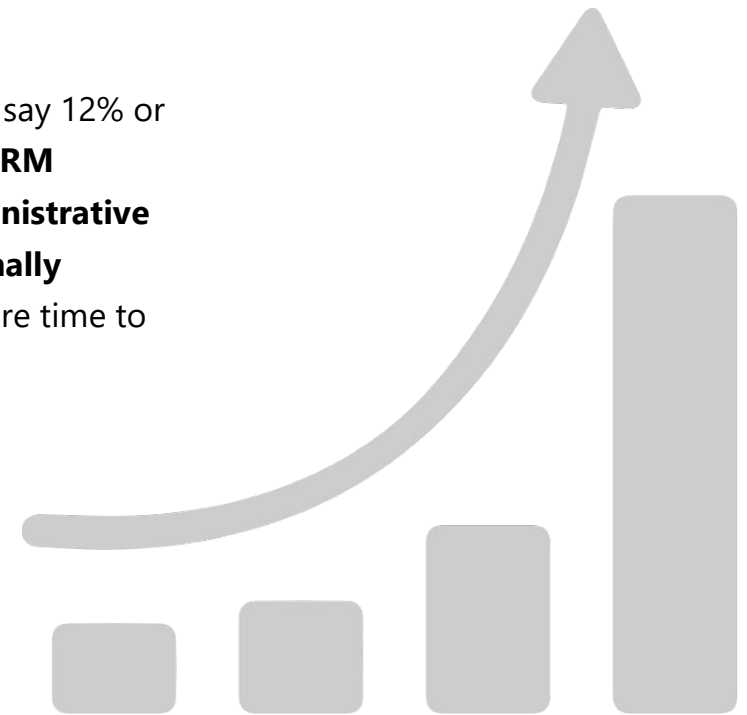
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#9

Increase sales

According to Nucleus Research, adding social and mobile access capabilities to CRM increases the productivity of sales reps by 26.4%. According to some responses we got from our customers, each of their sales reps saves, at least, an hour daily—that is an efficiency increase of 14.28%. Even these results are still amazing.

We can certainly argue about these numbers. They might be lower, let's say 12% or even 10%. They can also be higher. But the important thing is: **mobile CRM increases the efficiency of sales people by drastically reducing administrative tasks and producing value at the time which would have been normally unused**, such as traveling or waiting for appointments. So they have more time to spend doing what they're good at: selling.



#10

Improve customer relationship management

The goal of each CRM is to build relationships with customers. Even the name itself—Customer Relationship Management—points at its purpose. When you have all obtainable information about your customers in one place, you can start analyzing their habits, purchases, and preferences. Hand in hand goes improved customer relationship and increased revenue.

But what good does it do if you can't get to this info quickly when you need it?

Mobile CRM will give you uninterrupted access to valuable information about your customers, so you can look it up in any moment of need.



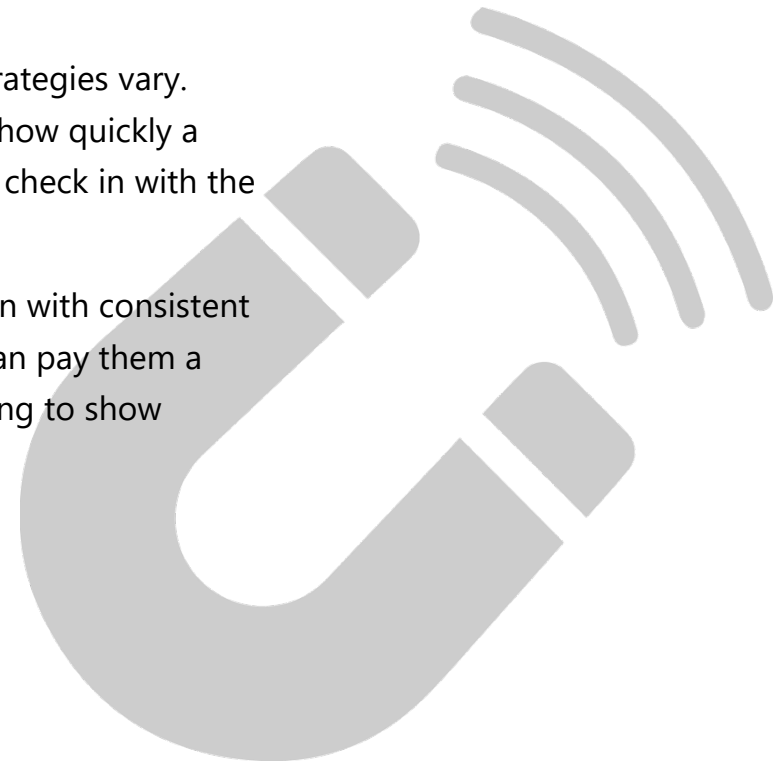
#11

Increase customer retention

Not all customers are created equal. Various studies have already proven that loyal customers are more profitable than new ones. So how do we keep the customers we have? We keep them happy. And this strongly correlates with the level of service we'll provide and the type of relationship we'll build.

Of course, each business is different, and its customer retention strategies vary. They can incorporate all sorts of things - ranging from optimizing how quickly a service ticket is answered to how often does the account manager check in with the customer to see if everything's running smoothly.

Mobile CRM is a tool that can help you improve customer retention with consistent follow-ups. You can see what customers are in your area, so you can pay them a quick visit. You can check the status of raised cases before a meeting to show you're keeping an eye on the progress. You can...



#12

Sell in the now

Have you ever shopped online? Chances are you have. And chances are you preferred those shops that display the price of the product and its availability in stock right there and then. People simply don't like not knowing this info and don't have the time or will to fill in the inquiry form and wait for a response. So why do that to your clients?

No more "I am not sure, I'll check with my colleagues and let you know" or "let me send it to you via email once I get back to the office". Info of products in stock, orders to be signed, product documentation that explains the ins and outs...all is available to you right there and then—when it matters.



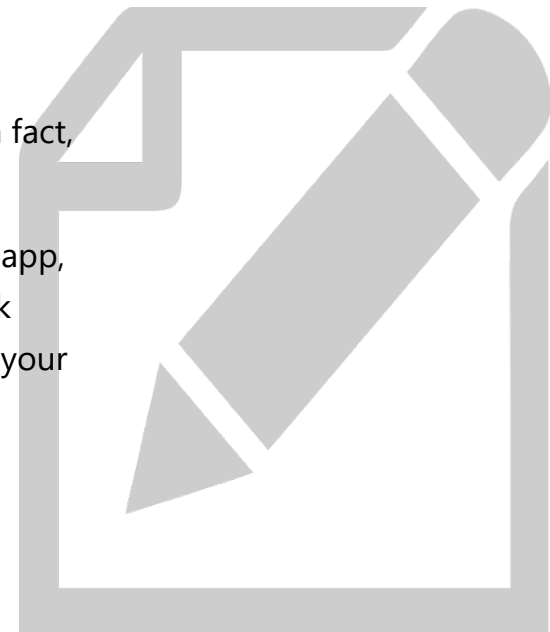
#13

Take notes after the meeting

During every sales meeting, your sole focus should lie on actively listening to what your customer has to say. Of course you want to preserve this knowledge for later—after all, asking the customer what was already said is a no-no in every professional sales rep’s book. The best way to preserve as much as possible is to take notes immediately after the meeting. However, this can get tricky, especially if you have very little time because you need to hit the road to get to your next appointment.

Mobile CRM allows you to take notes right as you walk out of the meeting. In fact, you might be quick enough to do it as you wait for the elevator.

Point being—when you take notes right after meetings via your mobile CRM app, you are less likely to forget something important, and you don’t need to think about typing in meeting notes into CRM at the end of the week when half of your memories get already fuzzy.



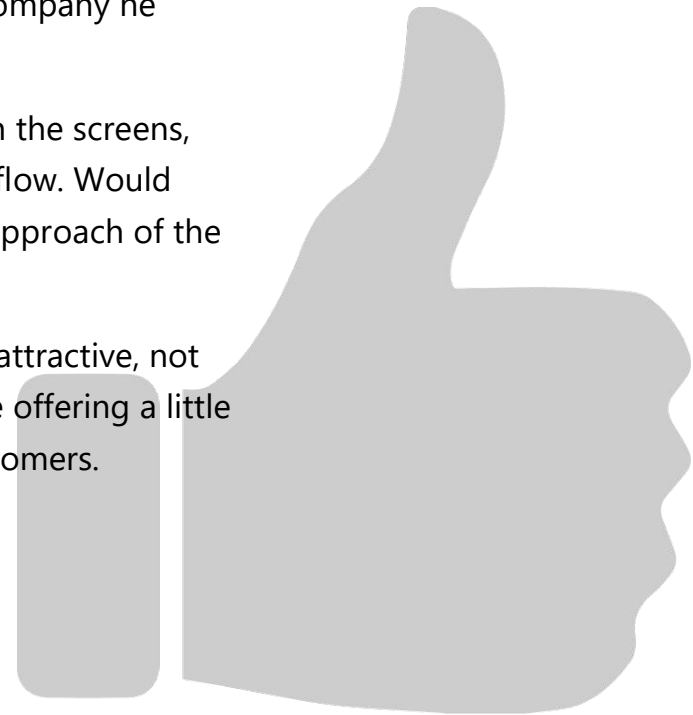
#14

Make a good impression

How would you react if you had a meeting with a sales representative and he comes in equipped with an old notebook that looks like it is at least 10 years old? Would you comment on it? Unlikely—you'll probably move on with the meeting, thinking something's odd. Would you feel like this person and the company he represents is modern? Probably not.

Now image this person coming in with a thin tablet, swiping through the screens, showing you presentations and taking notes without disturbing the flow. Would that impress you? Maybe. Would you feel confident of the modern approach of the company? Probably—it certainly won't harm its reputation.

The fact is: image sells a lot! We tend to buy things we like and find attractive, not necessarily those that better serve the purpose. So add to your value offering a little nudge—modern technologies that make an impression on your customers.



#15

Quickly interact with clients

A good salesman knows that to maintain good relationships with clients, one has to respond to their queries as quickly as possible.

Mobile CRM will give an echo to a salesman at the precise moment the customer tries to reach him. Whether it's in the form of an email, phone, lead in CRM or other means. Set up notifications, track phone calls, and email communication and stay in touch with your colleagues via chat and you'll never miss important updates.

But it's not only about how fast you can respond. It's also about how accurately you can do it. Mobile CRM will allow you to access immediately the insights from your CRM system, so you can get the information you need as you go. No need to delay your response for later.



#16

Improve lead management

How will one know when's the right time to contact the customer? It's easy. It's when the customer is reaching out to you.

Even Forbes says the odds of contacting and, in turn, qualifying a lead drastically decrease in time. That is why they advise companies to contact their leads as soon as possible, best within 30 minutes of the lead creation. With Mobile CRM, you can alert your sales reps of new incoming leads, so they can get to them while they're hot.

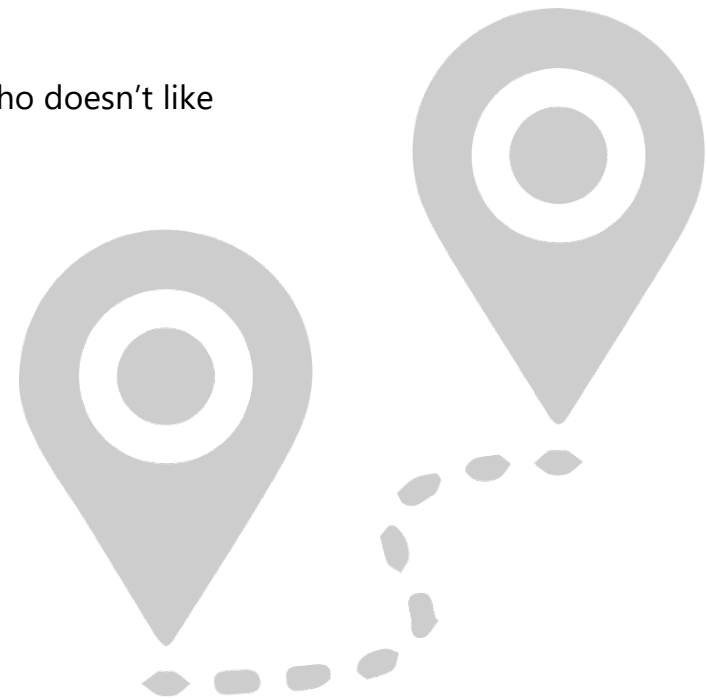


#17

Know how to get there

On your way to meeting a prospect? Or planning a whole day of customer visits? The map shows you where to go and how to get there. Mobile CRM app gives you directions to Accounts, Contacts, Leads or other chosen locations. You can even plan multiple appointments with the handy route planning.

You won't get lost and more importantly, you'll be on time. And who doesn't like punctuality?



#18

Identify opportunities near you

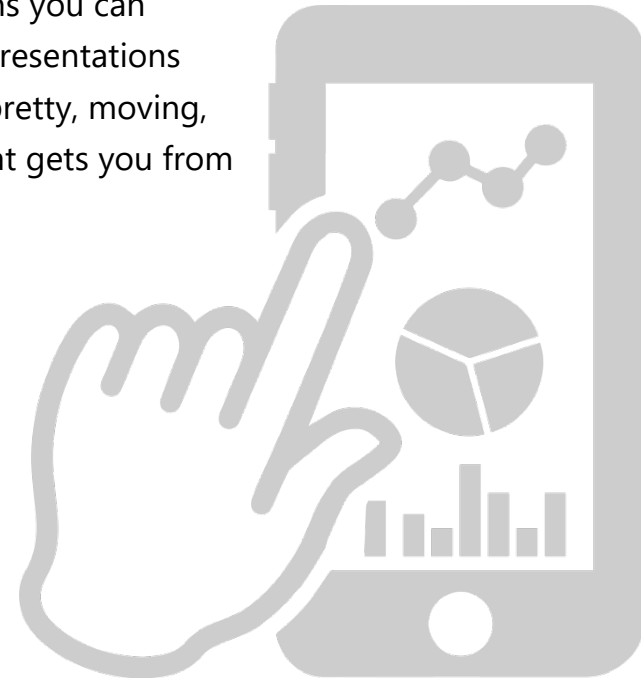
Got some spare time between meetings? Catch up with a customer closest to your location. The map shows you your current position, and you can easily zoom in and out to see which of your customers and prospects are nearby. Then it's just a matter of calling one and stopping by for a quick visit if they're available. Plus, it's also a nice gesture to call someone up just because you're in the area, and you happen to be thinking about them.



#19

Sell with stunning presentations & interactive demos

People just love visuals! But who wants another stack of brochures they'll never go through? Charm your customers with stunning product presentations you can swipe through and zoom into. Include animations and short video presentations and you got yourself a winner! All within the app, of course. Those pretty, moving, colorful things you can showcase might just be the tipping point that gets you from "maybe" to "where do I sign?"





Section 3

Improving processes

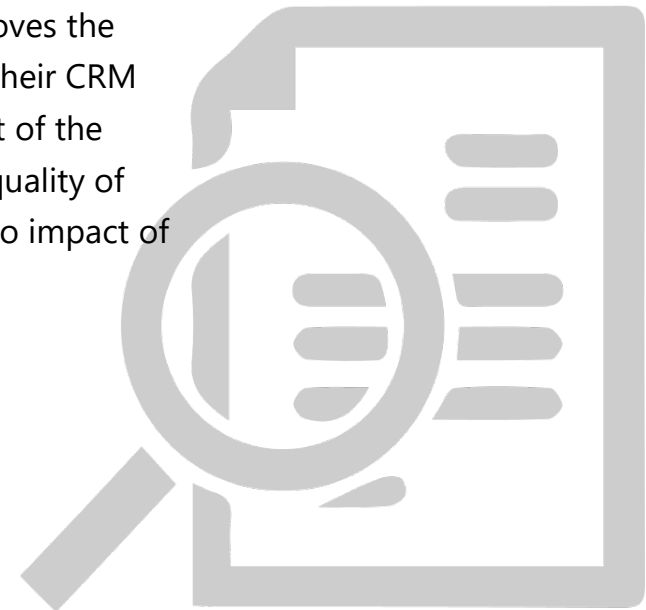
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#20

Improve data quality

Data is the cornerstone of any CRM system. Without it, or more accurately without good quality data, there'll be no customer insight and forecasts. Many companies struggle to keep their data up-to-date, accurate and plentiful. And boy, is this a struggle.

Luckily, according to a survey that reveals major CRM Buyer Trends for 2015 conducted by Software Advice, Mobile CRM greatly or moderately improves the quality of data. 53% of the salespeople say that thanks to the access to their CRM system on their tablet or smartphone, they noticed a great improvement of the quality of CRM data and another 29% says it moderately improved the quality of their data. Only 18% of the respondents thought there was minimal or no impact of Mobile CRM.



#21

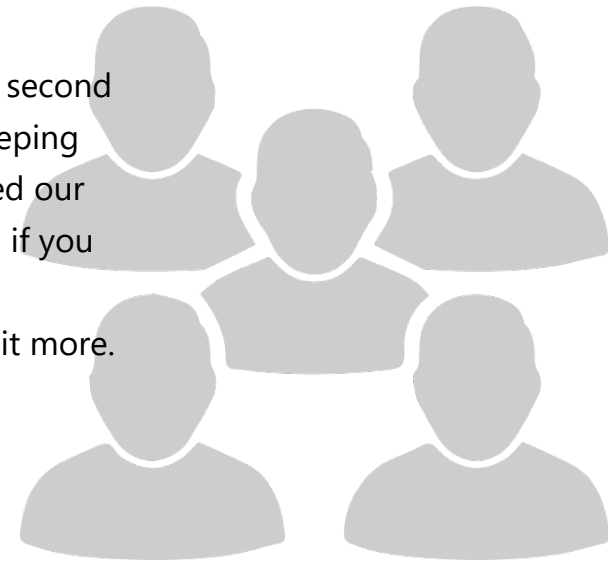
Increase user adoption

One of the biggest challenges of any CRM implementation is the user adoption. Translation: "Will the users actually use it? If not, we've just wasted money."

The adoption rate of CRM tends to be low because A: the CRM system is difficult to use, B: people don't see real value in it and C: people find it hard to change.

Now consider this: You can address the issue A and C with mobile CRM! A bit of B as well. How?

Spoiler alert: **People are used to having phones and tablets.** It comes as a second nature to us: we wake up and the first thing we look at is not our partner sleeping next to us, but our phones. Sad, but true. Phones have so deeply impregnated our lives; we don't go a day without them. Why should it then pose any problem if you give people a mobile access to the CRM system? The opposite is to be true—employees who get mobile access to CRM are likely to adopt faster and use it more.



#22

Let the app do the work for you

Wouldn't it be nice to let the app do the work for you? Or, at least, parts of it? With an intelligent set of rules, you can automate tasks that take up your time or occupy your mind. For example, the delivery address can be already pre-filled when you create an order for an existing customer. Or a record will not be saved unless it's filled in correctly.

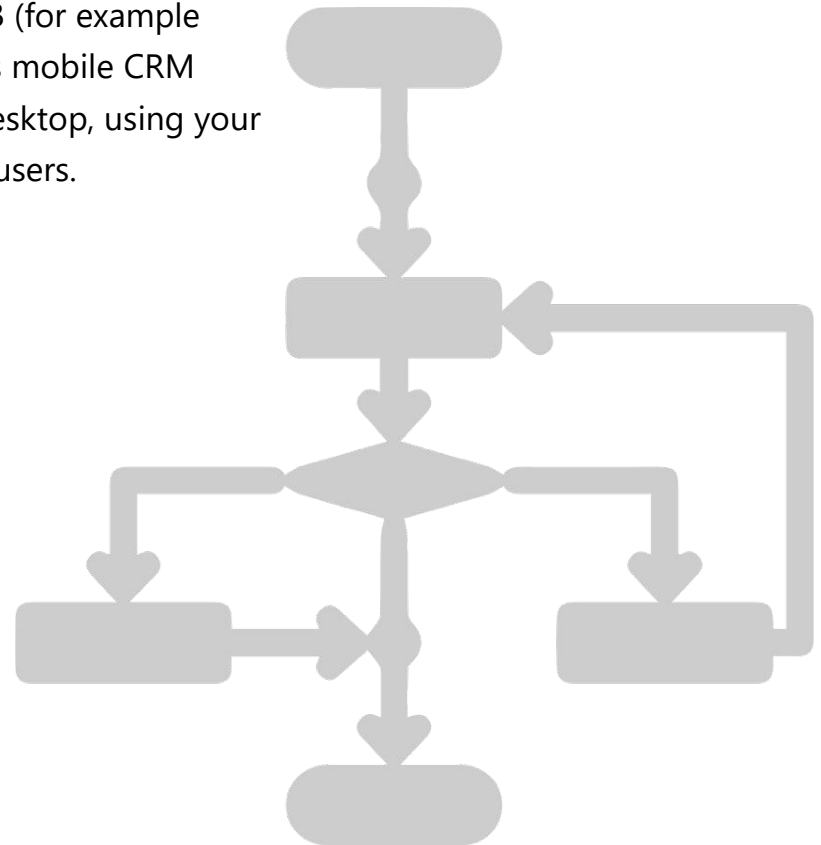
Let the app take up the mundane tasks that can be automated with rules. These save you time & ensure the data is correct.



#23

Utilize business process flows

Business process flows were one of the major additions in Greentree Software 2013. It is a guideline that navigates users from point A to point B (for example from new lead to closing a sale). And they are available in Resco's mobile CRM client as well. You can work the same way as you would on the desktop, using your process flows from Greentree CRM. No shortcomings for mobile users.



#24

Get the product to the customer faster

How long does it take for you to process an order? A day? Two to three days? How about a couple of minutes? That's the possibility a Mobile CRM offers.

Instead of sending the orders back and forth between the sales rep and the customer, your sales reps can create the order right during the meeting with the customer, have it verified and signed on the spot and sent it back to the office for order processing with a click of a button. Whoosh, on the way to the customer the product goes.

With an instant gathering of orders from field workers, you can shorten the life cycles of orders and get the product to the customer faster than ever. And that's something worth investing into.



#25

Scan barcodes to get more info on the product

Say you are a pharma sales rep and you are talking to a pharmacist about a new range of products. You can give him the talk, but you can also step it up a notch and show off the medical study results and other supportive material to help your sale. You don't need to carry these with you or search for them manually in a large database of online documents. Instead, simply scan the barcode on the packaging and have the right information available in a blink of an eye.

After you get a go from the pharmacist, use the same approach for drafting an order—you scan barcodes or QR codes to add simply the products to the order. This speeds up the process as you no longer have to browse through them in a long product list and it prevents you from making mistakes by picking up the right product instead of accidentally selecting a similarly-named one.



#26

Run reports as you go

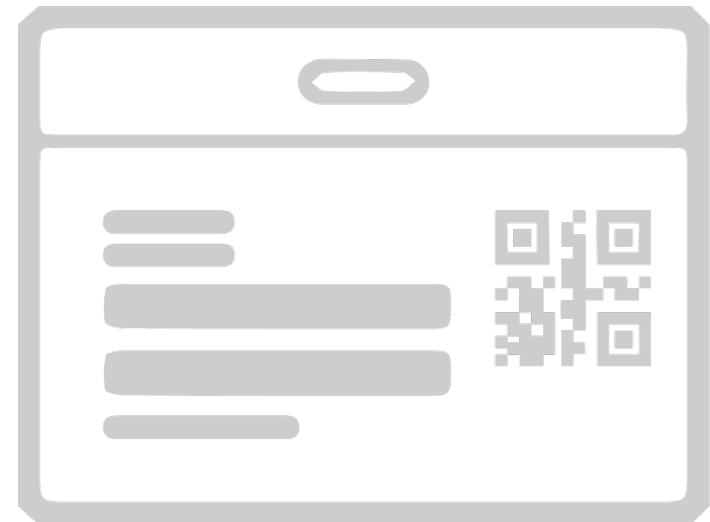
Gain meaningful insights from your CRM data utilizing the Run Report feature for individual records. Mobile CRM fetches the reports from your Greentree CRM server to be viewed in the application as a PDF file. You can select a different report from the list of available reports (provided there's more to choose from).



#27

Scan badges of event participants

Organizing an event and need to scan badges of its participants as they go into sessions? Or are you attending an event as an exhibitor and want to scan badges of prospects visiting your booth? You won't need to type them into CRM from gathered business cards or import them once you get back to the office and have the time to catch up on things. You can simply scan the code on the badge and voilà--the record pops up in the CRM system. Your colleagues at the office can immediately see the lead and can quickly follow up so that the requested info will be waiting for the prospect in inbox before he or she leaves the event.

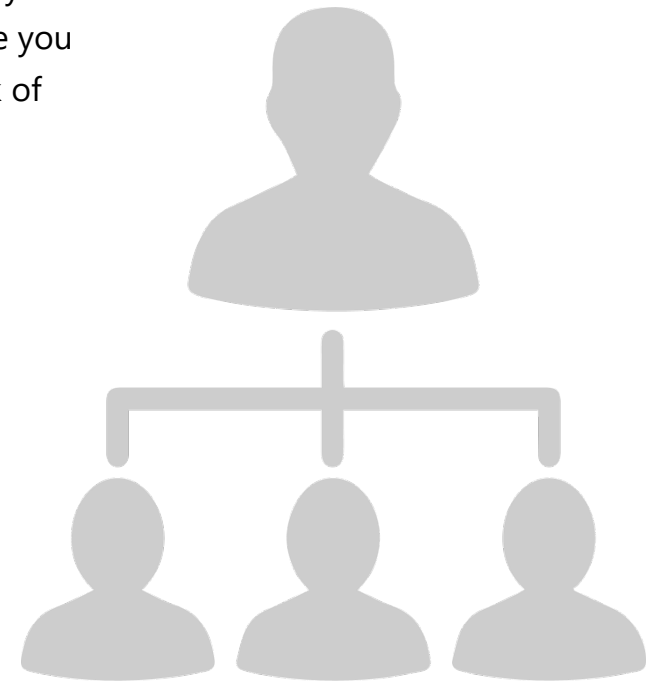


#28

Manage activities of your employees

Managing people is not an easy task as it is. And if you happen to be a manager who is often out of the office, you've got even more work cut out for you.

With Mobile CRM, you can stay on top of things, even if you are not present in flesh. You can assign activities to your employees, oversee the day-to-day processes and quickly react to all situations. Mobile CRM is going to give you valuable insights into your business, so you can handle the complex task of managing people a bit easier.



#29

Print documents

Even though Mobile CRM allows you to go paperless, there are still occasions in which the good old paper still serves a purpose.

Let's say you want to print a contract for your client to sign while you are still at the venue. Or you want to print out a certificate, warranty or a price list. You can do it all from your tablet or phone. You can open the attachment directly in your Mobile CRM app and hit Print. The good news: You can print from anywhere. The other good news: As most printers support wireless printing nowadays, it's not as hard to set up as you might think.

