

KM on the go—Sales force automation tools drive business

- [Kim Ann Zimmerman](#) of KMWorld Magazine

by Kim Ann Zimmermann

The mobile sales force has several unusual challenges in terms of managing knowledge. The first is being able to access from the road the vast amounts of data stored in the enterprise system. While many companies are developing Web-based portals for remote workers to tap into corporate KM systems, the portals are not always convenient to use when the salesperson is in front of the client. Mobile users need to be able to quickly access a few key pieces of information.

On the flip side, the sales force is out there collecting valuable information about clients that needs to make its way back to headquarters. For example, the sales force for [Liggett](#), a manufacturer of consumer goods, uses software from [AvantGo](#) to log information such as competitors' coupons, shelf placement and order history as they visit retail clients.

With the increased need for the sales force to share and capture knowledge, the market for mobile field sales applications and services is expected to grow from \$132 million in 2002 to more than \$1 billion in 2006 in the United States, according to a recent report by the [Yankee Group](#).

Mobile support

"Browser-based extensions of SFA applications will face implementation challenges due to their reliance on high-speed Internet connections—or worse, relying on ubiquitous wireless connectivity," says report co-author Gene Signorini, wireless/mobile enterprise and commerce senior analyst. "Instead, successful mobile field sales support will evolve into workflow-oriented solutions that integrate information from a variety of applications on devices such as PDAs with disconnected capability."

"People in the field often feel disconnected from the knowledge that those who are in the office can tap into," says Ojas Rege, VP of product management for AvantGo, whose software serves as an integration tool between the SFA and knowledge management systems. "The challenge is to get KM to the point of activity. Otherwise, KM is just a tool they can use to do research ahead of time, something not many salespeople have the luxury of being able to do for every sales call."

[Microsoft](#) recently announced its Mobile Workplace solutions for wireless messaging and customer relationship management (CRM), including sales force and field force automation. The Mobile Workplace is being used by systems integrators—including [Accenture](#), [Cap Gemini Ernst & Young](#), [HP Services](#) and [AT&T Wireless](#)—as a platform for linking the sales force with enterprise data.

While many companies have established sales force automation systems from software providers such as [Siebel Systems](#), [SalesLogix](#) and [Salesforce.com](#), the KM systems are often a home-grown mix of databases and search tools.

Tapping into information

"The hooks between the sales force automation systems and a collection of KM systems are not always easy to execute," Rege says. "Often, the people who are in the office every day know how to use these systems to the maximum, but that is hard to do remotely." That is particularly true, according to Rege, because many companies use intranets for knowledge storage. "But the sales force needs to be able to tap into the databases of competitive intelligence, best practices and product collateral," he adds.

The difficulty is balancing the amount of information users can tap into from the road. "We do some work with one of the big oil companies," Rege explains. "They've got folks on drilling platforms in the middle of nowhere. They need to tap into the company's best practices knowledge management database, but they're not carrying laptops around. The trick is to bring critical portions of the KM database to them."

Another example of the link between enterprise knowledge and sales force automation tools is an implementation in the sales department of [The Seattle Times](#). The company has steady customers and also those who advertise only once or twice a year, so sales reps need to track hundreds of occasional advertisers. "Many of those little, seasonal and special-interest advertisers were falling through the cracks," says Brian Jonas, advertising CRM administrator for the company. "We wanted a tool sales reps could use to capture whom they were talking to and share that information."

A team from [SalesPath](#), a SalesLogix business partner, created checkboxes in SalesLogix that sales reps now use to note when such customers want to advertise. Then, about 60 days before their advertising time arrives, a BusinessAlert is generated in SalesLogix and sent to each advertiser's salesperson, reminding him or her that it's time to contact that customer. BusinessAlerts are also generated in SalesLogix for advertisers who have been inactive for a certain period of time, encouraging sales reps to get in touch with them. "Sales reps have had that information available to them through various business system reports, but they didn't look at them," Jonas says.

The sales force automation system also helps reps as they relocate to different areas. "As reps moved from one territory to another," Jonas says, "the new rep coming in wasn't given a whole lot of information about whom they were supposed to see and what was important to those advertisers. They had to start from scratch."

Other SFA tools

While much of the work being done to link sales force automation and knowledge management tools is focusing on the mobile work force, some systems are aimed at making it easier for telemarketers to search multiple databases and other content. [FrontRange Solutions'](#) KnowlixFrontline, for example, allows users at help desks and customer support centers to perform searches or create best practices that can be shared with other reps.

Another KM issue facing the sales force is consistency of information. Salespeople using laptops for presentations, for example, might download data directly to their PC and only periodically update marketing and other materials that are shared with clients. [Proscaple Technologies](#) recently introduced a Tablet PC Edition of its presentation software that allows quick updating of sales and marketing information. The Proscaple Tablet PC Edition integrates with sales force automation systems like Siebel to track which presentations were made to which clients.

Kim Ann Zimmermann is a free-lance writer, 732-636-3612, e-mail kimzim2764@yahoo.com.