

# CWR Mobile CRM

*Organization Trial Success Criteria*



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## Organization Trial – Success Criteria

As you plan for your CWR Mobile CRM Organization Trial, we want to provide a quick summary of key items that you may want to add to your task list to ensure you don't have any surprises during the evaluation, pilot or proof of concept. Additionally, we should note that entire books have been written on how to conduct software evaluations.

Our intent is not to duplicate any of those common best-practices; rather it is to call out specific issues relating to Dynamics CRM and CWR Mobile CRM that you will want to think about as you complete your Organization Trial.

## Identifying the Key Stakeholders

As with any project, you want to make sure that you have included the right stakeholders from the start of the project. You will certainly want to include:

- **Business:** the functional leaders responsible for the impacted areas of the business, e.g. VP Sales, VP Service, VP Marketing, VP Field Operations, etc.
- **Users:** the right representatives of the functional users, including power users, influencers, users on specific mobile platforms, e.g. representatives on Apple iPhone and iPad, BlackBerry, Android, and Windows as appropriate.
- **IT:** the IT leaders responsible for requirements, configuration, deployment and maintenance of the Dynamics CRM system. In many organizations this might also include your key Dynamics CRM Implementation Partner.
  - Mobilizing Dynamics CRM cuts across several IT functions and it is important to ensure that you have included:
    - Dynamics CRM Administrator: CWR Mobile CRM is built in, with and for Dynamics CRM and therefore requires Administrator-level privileges to configure the entities, views and forms.
    - Networking and Security: CWR Mobile CRM needs to activate a mobile web service that is accessible to mobile users, which may require opening a port or leveraging an existing Internet-Facing Deployment (IFD).
    - BlackBerry Administrator: In many organizations there is a dedicated administrator responsible for managing the BlackBerry Enterprise Server (BES), which can be used to deploy and manage CWR Mobile CRM
- **Financial:** certainly any IT system investment requires funding and you will want to include the right financial supporters to ensure the business case fits the company's models and expectations.

- **Executive Sponsors:** as always include the executive sponsors all along the way to ensure that they project is well aligned with the company's overall goals and priorities.

By including the right stakeholders throughout the trial process, you will be on the path to ensuring that the results are well support.

## Business Goals and Objectives

Your company no doubt had specific goals and objectives for the Dynamics CRM implementation. However, these are not necessarily the same goals you want to apply to the mobility project. Every organization is different and every project may have its own set of goals. However, there are many web resources available to help you define and articulate these goals.

We want to call out one additional resource, a recent Aberdeen Research Report Quotas Untethered, which explains what best-in-class companies do differently and quantifies the benefits of sales mobility, including higher quota achievement, higher customer retention, and increased lead conversion. You can download the Aberdeen whitepaper [here](#).

So, whether you are looking to improve the productivity and effectiveness of your sales or service teams, or to better leverage your internal IT resources to deploy mobile solutions to your field personnel, make sure that your stakeholders are well aligned on the goals and business benefits you expect to get by mobilizing your Dynamics CRM.

## Trial Project Plan

The size and complexity of your company drives the level of detail required in your project plan. In many cases, your organization may already have defined policies and procedures for conducting trials or Proofs of Concept.

So, regardless of whether you just need to have us provision CWR Mobile CRM for your CRM Online instance (no hardware, software or server infrastructure required) or whether you need to download and install our server software from our portal, focus on the key steps that need to be addressed in your plan.

At its most basic level, all you need to do to conduct a CWR Mobile CRM trial is:

- Register for an Organization Trial on the CWR Mobility website
- Have us provision an instance of CWR Mobile CRM for your CRM Online instance **OR** download the CWR Mobile CRM server software from our portal. See the [CWR Mobile CRM Installation Guide](#) for more information on pre-requisites and steps to install the server software.

- Install the CWR “Default Profile,” which provides pre-configured settings for the Dynamics CRM Workplace items, including activities, appointments, tasks, phone calls, etc. as well as the default views and forms for Accounts, Contacts, Leads, and Opportunities.
  - You can follow the instructions in the [CWR Mobile CRM Implementation Guide](#) for mobilizing any of your Dynamics CRM entities. Depending on which user stories, scenarios or use-cases you have defined for the trial, you may need to leverage the point-and-click customization tools to bring those to life for your users. As always, please reach out if you have any questions or needs around specific scenarios.
- Add trial CWR users and select specific mobile devices/platforms for them to use to connect to your Dynamics CRM instance, including Apple iPhone and iPad, RIM BlackBerry, Windows Mobile, Windows Phone, Google Android or other web-enabled mobile device.
- Once you have authorized a mobile user, you will need to provide the mobile web service URL to your user. Please note that this is not the internal Dynamics CRM web service URL, rather a specific CWR Mobile CRM web service URL.
- CWR Mobile CRM runs as a native application on all of the major platforms. So, your user will download the CWR smart client from the appropriate marketplace (e.g. AppStore, AppWorld, etc.) or from your CRM server. When they run the application for the first time, it will ask for the login credentials. This starts a two-step process, which we recommend doing when the mobile device is using a WiFi connection as you may have a lot of data you want to transfer to the mobile device.
- The first step is the Initialization Process, which takes the configuration profile you have defined within Dynamics CRM and uses it to create the offline database, including all of the table and fields.
- The second step is the Synchronization Process, which you will kick off after the Initialization. This will transfer the local data you have selected to the mobile device for this user.
- Your trial user will now be live with their Dynamics CRM data on their local device, and they can begin to walk through the specific user scenarios you may have defined for their trial (or leverage the [Trial Walkthrough Guide](#) scenarios).

For a CRM Online trial, you can have a user up and running in less than one hour after receiving your provisioning information. However, for larger enterprise trials, the gating factor is usually the internal network and security infrastructure.

## Confirm Trial Success Criteria

One of the key activities of the trial is to ensure that your users are able to complete the key user scenarios that you had defined for the trial. A trial is certainly not a full implementation, so you should be careful to have set -- and been managing expectations -- as to the specific functionality the mobile solution provided during the trial.

You will want to collect feedback from each of your key users groups (on each mobile platform) on how well they were able to demonstrate each of the user scenarios and how well that supported the business objectives you had defined.

In addition to specific scenarios, there are a number of factors that relates to the mobile application platform itself. Some of the common success criteria you should include in the evaluation are:

- **User Experience:** the familiarity and intuitiveness of a native smart client that is specific to their mobile device, e.g. Apple vs. RIM vs. Windows, and which leverages all of the design standards for their specific mobile device.
- **Speed and Performance:** the speed and performance of a native smart client versus having to use a web browser and wait for screens to refresh and repaint to get their CRM data.
- **Offline Access:** the ability to have access to all of their CRM information when out of the office, whether out of cell range, in an office build, parking garage or on an airplane.
- **Hybrid Access:** the ability to go online when needed to retrieve any data that might not be defined in your profile (e.g. when covering for a colleague in another territory).
- **Background Synchronization:** the ability for the application to keep your mobile device up to date by synchronizing data in the background between the mobile and the server.
- **Multi-Device Access:** the ability to have all of their information on their phone (e.g. capturing phone call activity on their BlackBerry) as well as on a tablet (e.g. being able to quickly find data on their iPad) at the same time.
- **Integration with Native Applications:** the ability to access Dynamics CRM from within the native Email, Calendar, Contacts, Phone, Tasks, etc. capabilities of their mobile device for the manufacturers that allow it (not Apple).
- **Ease of Installation:** ease of downloading CWR Mobile CRM from the iTunes App Store, BlackBerry App World, and/or Windows Mobile/Phone marketplace.
- **Connect Securely:** the ability to have CRM data encrypted both when being transferred to the mobile as well as when it is stored in the local device database.

- **High User-Adoption:** the ability for teams to be productive in the field (where they can update their CRM system and tasks in real-time) throughout the day, rather than maybe doing it once they get back to their desks at the end of the day.
- **Extensibility:** the ability to add custom functionality, including barcode scanning, signature capture, credit card processing, mobile printing, etc.

Some additional success criteria for the IT department should also include:

- **Multi-Platform Support:** the ability to configure CWR Mobile CRM once (right from within Dynamics CRM) and then push it out to any type of mobile device on any platform.
- **Native to Microsoft and to Dynamics CRM:** the ability for the IT team to leverage all of its existing Microsoft and Dynamics infrastructure (with no dependencies on 3rd party tools or platforms), including all of the team's existing skills, knowledge and experience. The ability to complete all of the mobile configuration within Dynamics CRM and not need a separate program or application to do the configuration.
- **Ease of Deployment:** the ease and convenience of deploying CWR Mobile CRM through the iTunes App Store, BlackBerry App World, Windows Mobile/Phone marketplace or from your own server (BES).
- **Dynamic Application Reconfiguration:** the ability to make changes to Dynamics CRM views, forms, fields, etc., then publish those changes and have every mobile device automatically update itself during the next synchronization (without having to redeploy a new mobile application every time you want to push an update to the field).
- **Multi-lingual, Multi-currency Support:** the ability to run the mobile application in your native language and currency from a single global deployment.
- **Multi-tenant:** the ability to support any number of departmental and divisional CRM instances from a single mobile deployment.
- **Portable Application Model:** the ability to simply export/import the CWR Mobile CRM profile to move all of the advanced mobile functionality from Development to Test to Production as needed.
- **Employee Owned Devices:** the ability to leverage employee owned devices (regardless of platform) rather than having to buy corporate devices for every employee and requiring some employees to carry multiple phones.
- **Real-time Data Exchange:** the ability to access all Dynamics CRM data and web services without using staging or synchronization databases, as well as the ability to maintain all security, workflows and plugins.

- **Extensibility:** the ability to add custom functionality, including barcode scanning, signature capture, credit card processing, mobile printing, etc.
- **Power of Choice:** the ability to deploy CWR Mobile CRM as a hosted offering or on-premise, and be able to switch back and forth anytime.

As you move from “planning your trial” to “conducting your trial”, please know the CWR Mobility is here to assist you and/or your CRM implementation partner as you evaluate advanced mobile solutions for Dynamics CRM.

So please contact us with any questions or issues, and we will assist you on your journey of improving the productivity and effectiveness of your marketing, sales and/or service teams.

## About CWR Mobility

Our mission at CWR mobility is to help organizations gain *The Power of Close™* -- the power to get closer to customers and stay there, increase customer satisfaction and loyalty while reducing the costs of customer interaction, and create a more agile and effective customer-facing organization.

We are an Independent Software Vendor and the leading provider of mobile CRM solutions. By offering the most advanced, multi-platform mobile CRM solutions -- based on the Microsoft Dynamics CRM platform – CWR Mobility continues to set the mobility standard for the entire CRM industry. We are committed to continuously taking Mobile CRM to the next level, enabling customers and partners to capitalize on the latest technology trends to make the most out of their businesses.


We have developed a partner network that already spans Europe, the Middle East and Africa, The Americas, Asia and Australia/New Zealand. Together with our partners we are delivering horizontal and vertical mobile CRM solutions to Enterprise and SMB companies in every corner of the globe.

## Microsoft Gold Certified Partner

CWR Mobility is a Microsoft Gold Certified Partner with competencies in Microsoft Business Solutions, Mobility Solutions and ISV/Software Solutions. CWR Mobile CRM is a Microsoft Certified Solution for Microsoft Dynamics CRM.

## Two-Time Global Partner of the Year Award Winner

For two consecutive years running, in 2010 and again in 2011, CWR Mobility has received [Microsoft's highest global award for mobile solutions](#) -- Mobility Business-to-Business Application Partner of the Year.

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