



Mobile BI for Sales



Growing Your Pipeline with Mobile BI

Whether you're away from the office for a few hours or several weeks, your success at generating new leads and winning new deals often hinges on how mobile-friendly your access is to the latest intelligence on your prospects. To get the latest intel on a client or perform an accurate opportunity assessment, do you have to wait until you can fire up your laptop or can you get that business intelligence (BI) just as easily from your smartphone or tablet? Your mobile device has likely become your lifeline to sales success while on the road, but that success is limited if it can't effectively access and act on key sales intelligence. That's why a growing number of organizations recognize the value that mobile BI brings to sales success and business growth.

Unfortunately, determining the right mobile BI strategy and solution can be challenging amid a mass of conflicting vendor claims, analyst reports and social discussions. As a result, some organizations unintentionally end up adopting BI solutions that actually cripple their sales professionals' ability to grow and manage their pipeline while in the field. To ensure your organization helps instead of hinders your sales efforts, the following four aspects of mobile BI have a direct impact on your sales success and need to be evaluated by your corporate decision makers as they consider their mobile BI strategy.

- Mobile device considerations
- Mobile BI user experience
- Staying Connected
- Unified BI Data and Interface

Mobile Device Considerations

Whether you prefer an Android, Apple or BlackBerry device, you want to make sure your organization chooses a BI solution that supports your preferred device now and in the future. Even if you use an Android smartphone today, tomorrow you might decide you'd rather analyze your pipeline on an iPad. But the reality is that many BI vendors base their solutions on technology that doesn't or will not always work on all the different flavors of mobile devices.

For example, a number of BI vendors rely primarily on proprietary technology like Flash, which a number of mobile device manufacturers no longer support. As a result, this has left users of these devices without mobile access to critical information while they wait months and months for their BI vendor to redesign and develop a new solution that works.

To make sure you can always access your sales intelligence regardless of your current choice of mobile device, your organization needs to choose

a BI solution that not only supports all the different mobility flavors, but that also leverages multiple methods and open web standards (e.g.: HTML5 and JavaScript) for visualizing intelligence data. This provides the greatest guarantee that even as your device preferences evolve or as device manufacturers change their technology, you'll always be able to access your business intelligence while mobile.

Your organization also needs to consider how their BI solution handles different screen sizes and resolutions. Perhaps it lets you view 6 quarters of your sales forecast just fine on a tablet, but when you pull it up on your smartphone, the screen only shows you 3-1/2 quarters instead of your entire chart. Your BI solution should automatically and dynamically adjust the placement and layout of your dashboards based on the screen size, resolution and capabilities of the mobile device you happen to be using at the time. Not only will this lower your organization's development and support costs, but it will give you a consistent presentation of sales intelligence regardless of what mobile device you choose to use.

Mobile BI User Experience

Many BI systems provide a great user experience when accessed from a desktop or laptop, but that experience often deteriorates on mobile devices. As a result, it becomes a significant challenge for you to fully leverage your sales intelligence when going mobile. One of the main causes of this poor user experience is a lack of consistency between the mobile and desktop user interfaces, and even a lack of consistency between differing types of mobile devices. A lot of BI vendors will claim that they offer a consistent experience between computers and different mobile devices, but when you actually try it from your smartphone or tablet you quickly discover it doesn't work as expected.

For example, some BI solutions present a stunning interface that looks great on your mobile device, but it doesn't allow you to perform even basic operations. You can't drill down on your KPIs or filter by various dimensions like region or line of business. It might present a really pretty picture of bars and graphs, but it might not let you do anything useful with those pictures. Other BI offerings might provide you some mobile functionality beyond a pretty static picture of your dashboard, but what used to be a single click on your laptop to drill down or filter could take three or four taps on your tablet to achieve the same results. Or maybe it works just fine on your tablet, but not on your smartphone.

Some BI solutions manage to provide the same level of functionality on mobile devices as their desktop counterparts, but often with a mobile user interface that is significantly different than the desktop interface. In these cases, you often end up with a mobile user interface that is not as intuitive or as easy to use. It might require different actions to achieve the same results or it might not provide the same at-a-glance useful information. For these solutions to be of any use to you, you often have to sit in hours of training on the interface when you could be out making money instead.

This gap between the desktop and mobile experiences might seem like only a minor

inconvenience at first, but over time it can grow from a significant irritation into a major impediment to getting the intelligence you need to feed your pipeline. You need your mobile BI experience to be as similar as possible to what you experience on your laptop or desktop—the same look and feel, the same behavior and interactivity, the same login, and the same rich experience. You need a mobile BI solution that's intuitive and easy to use without any ramp-up time or training.

Staying Connected

Whether you're on the golf course, poolside or in a taxi between sales visits, you need to stay connected to what's going on back at corporate and with your different clients. Your mobile BI solution needs to not only give you easy and intuitive access to the information you need wherever you happen to be, but it needs to alert you when a new client comes on board or if one is about to jump ship. Based on that alert it should let you easily access the KPIs that show you at a glance the context for that alert.

You shouldn't have to be in the office to get a live feed of detailed, sale-critical information. Your BI solution should also let you collaborate with your colleagues even when you're not logged in from your desktop or laptop. You need the ability to chat, as well as give and receive instant feedback on sales numbers and metrics. When you bring up charts and graphs on your tablet, they need to represent the same numbers that your peers are seeing back home.

Unified BI Data and Interface

Your organization might use Salesforce, Siebel, NetSuite, spreadsheets and a myriad of other sales and business tools. To ensure consistency and real-time accuracy of intelligence, you need to make sure your organization chooses a BI solution that unifies all the data from those different sources into a single view. If a sales manager updates a number in a spreadsheet, Salesforce, or any of your other tools, the BI solution should

automatically gather in that data and make it accessible to you through any device, including your iPhone, iPad, Blackberry or Android. That seamless unification of data gives you confidence that you always have the most recent intelligence and the same version of the truth as everyone else on your team, no matter where you are and no matter what device you use.

That unification of data should also unify your interface. While you're on the road you can't mess with having to run a report in Salesforce, checking a few metrics in Seibel or NetSuite, and then analyzing some spreadsheet that one of your colleagues just emailed you. Having all your business intelligence gathered in one place should enable your BI solution to let you view an accurate, real-time graphical representation of that intelligence through a consistent user interface on any mobile device.

Sales-Friendly Mobile BI

While the BI market is crowded with mobile products, iPad apps and vendor claims about easy access to data on smartphones and tablets, only a small number of solutions can meet all of the criteria outlined in this brief. One of those solutions, Domo, gives you collaborative business intelligence that's fast, simple and always up to date. Based on open web standards and using the identical KPIs built for desktop web consumption, Domo delivers the same rich, intuitive and secure user experience whether you're accessing your intelligence data on a desktop, laptop or mobile device of your choosing.

For more insights on how a mobile BI strategy powered by Domo can make you a top performer, visit www.domo.com, follow @domotalk or call 1-800-899-1000.

