AI Revolution in Mobile CRM

THE 4TH DIMENSION OF COMMUNICATION

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INTRODUCTION

HOW MOBILE IS OUR FUTURE?

You may not realize it—or the fact may have snuck up on you while you weren't looking—but today there are far more smartphones out there than computers. There are currently an estimated *3 billion smartphones in use globally*. Just to show the comparison, in 2017, *the percentage of smartphone users accessing the internet was 63%, versus 37% by computer*. There are parts of the world that don't even have computers, but yet have mobile.

There are endless applications available for smartphones today. It's not just a phone directory—that functionality is so common that you don't even hear about it anymore. We've long gone beyond personal photos and music, and booking of trips. We have complex apps such as mobile banking, credit card scanning, project collaboration, and many more.

GENERATION 5

The first generation of smartphones only allowed you to call and to text. Each successive generation has brought increased functionality, such as higher bandwidth and the ability to send more complex data such as sound and video files. We've now reached the point of live streaming.

You might remember the first smartphones—the "flip phone." Smartphone screens have gotten bigger and bigger, and today are almost 6.5 inches. The screen is now almost as large as that of the very first Macintosh computer. Of course, that screen was monochrome, and today screens are sharp rich color, and are touchscreens. Smartphone 3D screens have now even become available.

We're currently moving into the 5th generation of smartphones—5G—which incorporates the *Internet of Things*. We're not simply communicating anymore with smartphones, but including control of any smart-enabled devices such as home security, automobiles and even appliances. Verizon already has a 5G network up and running in parts of the US, and it's being tested in Europe. Changes are coming down the line with unbelievable speed.

COMPANY MOBILE STRATEGY CRUCIAL

I predict that 5G is the next major fundamental move, and either you're in or you're out. A mobile strategy is crucial for every company, because expectations for the future are what is currently on everyone's phone.

At Pipeliner, we began our mobile strategy several years ago. We currently have the most advanced mobile CRM in the world today. We're not only dedicated to mobile, but we're working hard to remain the forerunners in this technology.

You can clearly see that the future is, indeed, completely mobile. The challenge for businesses and sales is, and will continue to be, for mobile to work seamlessly with the whole system.

What further criteria will be needed for a for a business mobile strategy? It is this we will be exploring in this ebook.

Let's get started!

Nikolaus Kimla
CEO and Founder of Pipeliner CRM

1

MOBILE: COMMUNICATION'S FOURTH DIMENSION

Communication has a very interesting history. When laid out in four separate dimensions, as I will do here, it can be seen how radically mobile communications has affected our civilization.

FIRST DIMENSION: ANCIENT TRADE

If we go back to the beginning of mankind's history, people were nomads. Then some stopped moving about and put down roots, and became farmers. Around the time of the Bronze Age, roads were built and traveled between settlements, mainly for the purpose of trade—and that was our communication. For the most part communication was conducted live and in person

between people who had travelled. You could send written communication to someone, but it could take months to arrive.

SECOND DIMENSION: SHIPS

We come up the line a few thousand years and and we come to the era of ships. Sailing was a whole technology developed over a thousand years or so, that came to fruition during the age of exploration in the eighteenth and nineteenth centuries. We know the names of the most famous explorers—for example Drake, Columbus, Da Gama, and Cook. Europe was the center of this period, as all of these explorers set out from, and returned to, Europe.

THIRD DIMENSION: AIR

When we move up to the twentieth century, people finally take to the air. It was immediately evident that fixed-wing flight could make communication easy and fast, and it indeed has changed everything.

A side note is that following World War II, we were left with so many airplanes and so many airfields (airports) that we needed to figure out what to do with them. The result of that "figuring" was the passenger aircraft industry, which really took hold by 1950. That year alone, just in the US, there were already some 500 million people traveling by plane. Today, just 40 years later, it's closer to 900 million. Of course globally that figure is 3.8 billion.

But strictly in the communication arena, the third dimension was air.

It's interesting to note that summing up these first three dimensions, the first one took about 5,000 years, the second about 500 years, and the third a mere 50 years.
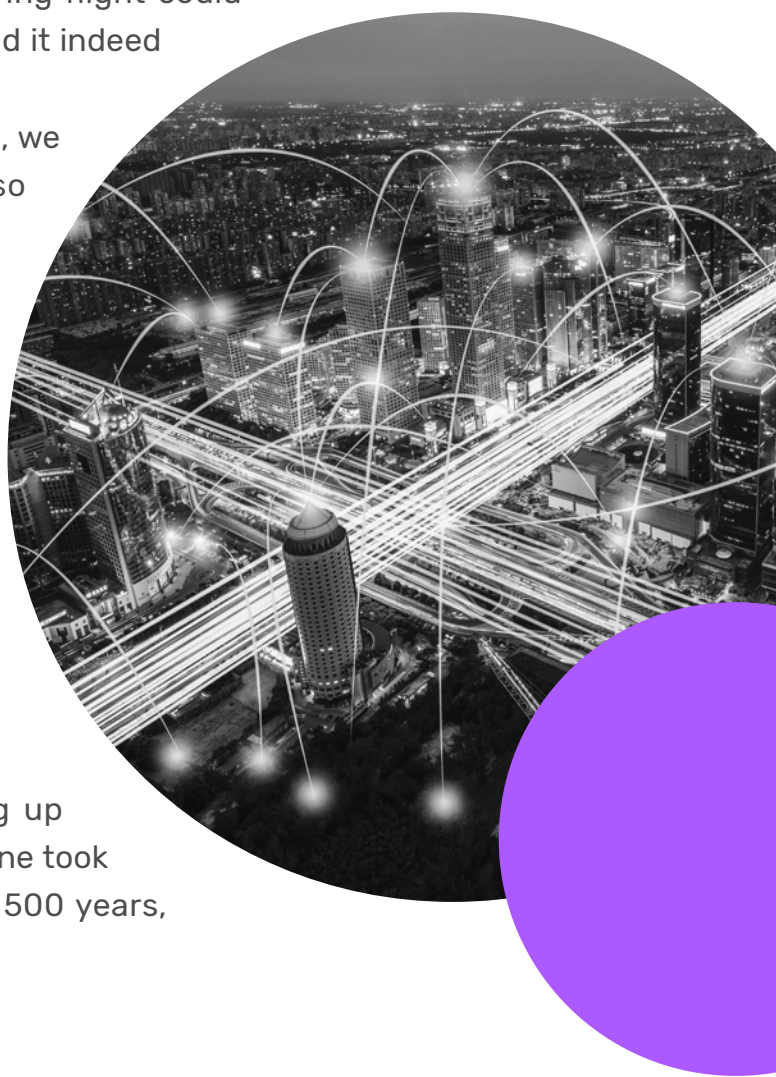
FOURTH DIMENSION: MOBILE

Now we come to a drastic paradigm shift in communication…and for this one we don't need to go anywhere or hardly even move. Now in a mobile-enabled society, a communication today is instant, made anywhere in the world to any other part of the world.

Another interesting comparison between the different dimensions is to note the winners in each one:

- ☀ In the first dimension, the winners were very definitely the traders.
- ☀ In the second dimension, the winners were the nations: Spain, Portugal, England, and Italy.
- ☀ In the third dimension the winners were the global companies.
- ☀ But in the fourth dimension, the winner can be anyone. It could even be a small company that develops an app that suddenly takes off like a rocket.

I strongly believe that in this fourth dimension, small companies have a disruptive energy to bring about changes even on an unthinkable level. Amazon founder and CEO Jeff Bezos recently remarked that even Amazon could be unseated today.

Another very interesting point about the fourth dimension is that, for the first time in history, we are no longer dependent on time or location. The

sun never sets on a company today. As an example, my company is a truly virtual enterprise, with employees all over the world. Thanksgiving is not a working day in the U.S., so our U.S. employees are off that day. But because we have employees in other countries where Thanksgiving isn't celebrated, as a company we are still open.

Not only can we work wherever we like, but also whenever we like—it's up to us. The only physical communication is between you and the servers. This technology obviously gives people a whole new freedom they didn't have before.

NO TURNING BACK

For everyone—companies and individuals alike—there is no turning back. The mobile platform is here to stay, and will only grow exponentially.

Carrying a mobile device is what enables us in today's world. There are apps for literally everything. For example when traveling, you must understand the culture, the language, where you're going, and the currency and exchange rates. In years past, all of these things were headaches, problems to be dealt with. Today with a smartphone and applications, they can be dealt with in seconds. You can access and read all about a culture. You can translate words or phrases from one language into yours, and vice versa. You can instantly find out an exchange rate. You can discover exactly where you are, and obtain directions to anywhere you want to go. You can find hours of operation for attractions or restaurants. Your mobile device can even navigate for you when you walk.

Problems which were painfully difficult for thousands of years can today be solved instantly—with that mobile device you hold right in your hand.

In today's fourth dimension of communication, mobile adoption is totally crucial—and anyone who doesn't adopt or who ignores the trends is committing a grave error.

2

THE MOST IMPORTANT COMPONENT OF ANY MOBILE APP

There are many important components that go to make up a worthwhile mobile app. But the most important component is... (drum roll please)...the user interface, known to most everyone today as the UI.

Very obviously, with a mobile app you're quite limited as to viewable screen space. A potential user will glance at it, and if they don't immediately get an idea of how it works, they're gone. Mobile users are quite impatient, and won't engage if they don't get it pretty close to right away.

THE LAPTOP OR DESKTOP DIFFERENCE

On a laptop or desktop computer, it's a little different. A user might persist a bit, access online documentation or help, or engage in a live chat with the vendor company. There is also technology with which the user can be onboarded step-by-step.

Beyond that, the laptop or desktop experience can be triggered, optimized, and fine-tuned down to even the type of user. For a CRM, that could be a sales manager, an administrator, or a salesperson. At Pipeliner, we're utilizing 4 different technologies today, right in the application, to help the user along. We have a chat window, a knowledge base, an onboarding technology, and a support ticketing system.

On mobile, however, such flexibility isn't possible. A potential user either understands it, or they don't. Even one too many clicks could lead a user astray, and they would be lost. Help and support on mobile is limited—you can't do a lot in such a small space.
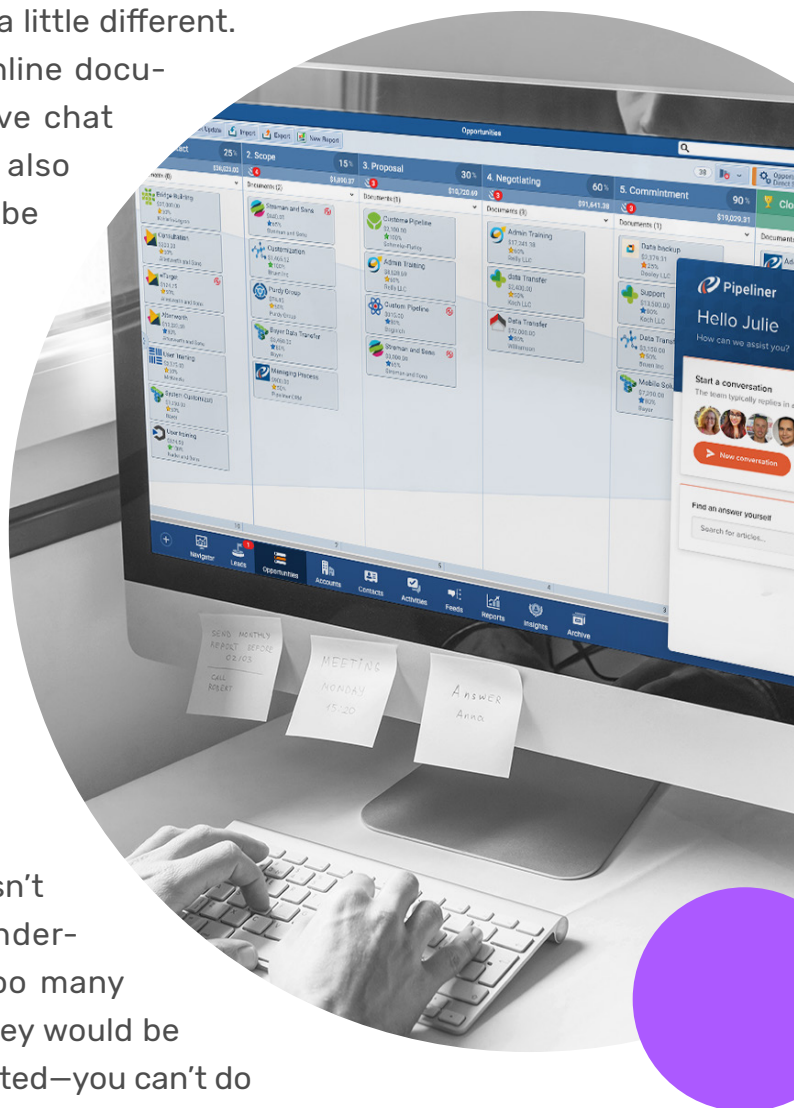
UI FOCUS ON THE USER

UI design, from my experience, isn't a matter of trend. In most cases, "trend is not your friend." Who sets a trend? It should never be a designer following along the lines of "what is cool right now." The UI should be designed completely around the user and their experience, and their ease of use.

I've actually learned a lot from games. Games provide a very good overview of how users onboard and interact. I've been paying very close attention to the online game Fortnite, one of the most successful games in history with over 250 million users. My son and everyone in his class is playing it. The target age group for this game is 9 to 14, and it's amazing to watch how fast these

kids are learning and interacting. They're not reading documentation! They're just jumping right in. The game is understood without a second thought.

Of course, a game must also be challenging. While a business app should be just as easy to use as a game, the "challenging" aspect cannot be part of it. The user of a business app isn't earning extra points by finding the hidden treasure or the secret weapon, so all functionality must be geared to ease of use.

VISUAL AND UNIVERSAL

A UI should be totally visual, because mobile itself is a visual tool. At Pipeliner, we've simply extended the design philosophy of our desktop version—dynamic instant visualization—to our mobile CRM. It is completely visual.

When it comes to symbology, our UI is designed in a way we know our user community will understand. There are many icons that are universal. For example, everyone understands that a star means "favorite." A plus sign (+) means adding something. A magnifying glass means "search." A gear sign indicates setup.

It's a similar scenario to icons seen on road signs—they're the same the world over so that drivers in any country will understand them. The same is true with icons in airports. With over 50,000 airports in the world today, and travelers from everywhere, can you imagine what would happen if each airport

decided to create their own icon for, as an example, baggage claim? Chaos would result.

This kind of uniformity is even more important on mobile, because mobile has even more users than automobiles or airlines. A majority of people in the civilized regions of planet Earth have mobile phones. If you don't have one, people regard you very oddly—you're living on the moon.

Apps should have a universal navigation system, even when colors, backgrounds and languages are different. An example is calendar apps—while there are different companies making calendars, they look pretty much the same. Otherwise how could someone use them and update them? People also want to know when holidays and special days are. These are different for every country, but the symbology is the same.

BUSINESS DIFFERENTIATION

While you should implement universal icons and instantly understood symbology, you must also integrate your own corporate look and feel into the design. We have done that at Pipeliner, and it requires a little bit of magic that every company has to utilize. If you don't do that, you're not separating yourself out from competitors.

You have to strike right in between being completely unique—having your own look—and being completely universal. There's a sweet spot in there so that you maintain your own look and feel but make it possible for any user to come along and engage with your app.

SIMPLICITY

Overall, the key that I always keep in mind as regards a UI is simplicity. This concept was communicated beautifully by *Steve Jobs*:

"Simple can be harder than complex. You have to work hard to get your thinking clean to make it simple. But it's worth it in the end because once you get there, you can move mountains."

3

REACH FOR THE STARS WITH PIPELINER VOYAGER: THE VERY FIRST AI MOBILE CRM

Now let's focus in on our own very latest innovation for mobile CRM. We call it Voyager, after the legendary space probe that has travelled further than any other man-made object. Voyager brings you the very first Artificial Intelligence functionality for Mobile CRM.

It's one thing to have statistics and numbers. But to interpret statistics requires intelligence, which is what we are providing with Voyager. Want to know how well you or your team are doing compared to last sales period? Want to see how you or your team have improved or are suffering with regard to opportunities? Lead count? Or accounts and contacts? It's all here—brought to you by Voyager AI, utilizing Pipeliner's instant dynamic visualization.

HOW IT WORKS

Let's start with opportunities, since that's usually the first thing salespeople and sales leaders want to know about. Voyager offers you four powerful views of opportunities:

Productivity—Shows you a comparison, as a ratio, of the current number of opportunities that have been won, as compared with the previous period, for a salesperson or team.

Velocity—Shows the speed at which a salesperson or team is winning opportunities, as compared with the previous period.

Winning Percentage—This metric compares a salesperson's or sales team's revenue from opportunities to the previous period.

Efficiency—Shows how efficient a salesperson or team is, as compared to the previous period.

Each of these metrics are color-coded so you can *instantly* see how each is performing, and rapidly take needed action:

Red=Negative—something needs to be handled.
Green=Positive—the salesperson or team is doing better!
Blue=Stable—neither increased or decreased.

You can view the "quick status" for opportunities, which gives you an instant, color-coded graphic of the above data.

ANALYSIS

From these views you can "drill down" to gain more granular insights.

From both Productivity and Velocity, drill down to the Productivity and Velocity Analysis, where you can see the number of opportunities, tasks and appointments created within a time period, and view instant comparisons to the last sales cycle.

From Winning Percentage, drill down to the Amount Analysis, which shows both won amount and lost amount in revenue, and compares to the previous sales cycle.

From Efficiency, drill down to the Efficiency Analysis, which shows you, in comparison to the last sales period, the degree of efficiency in relationship to tasks and appointments.

Each of these analyses provide several different graphical methods with which to view the data.

USER COMPARISON ARENA

This totally unique feature allows you to compare user performance, one with another.

HOT NOW

For opportunities, you also have a "Hot Now" window which shows your hottest deals and their close dates. Know where to put your priorities.
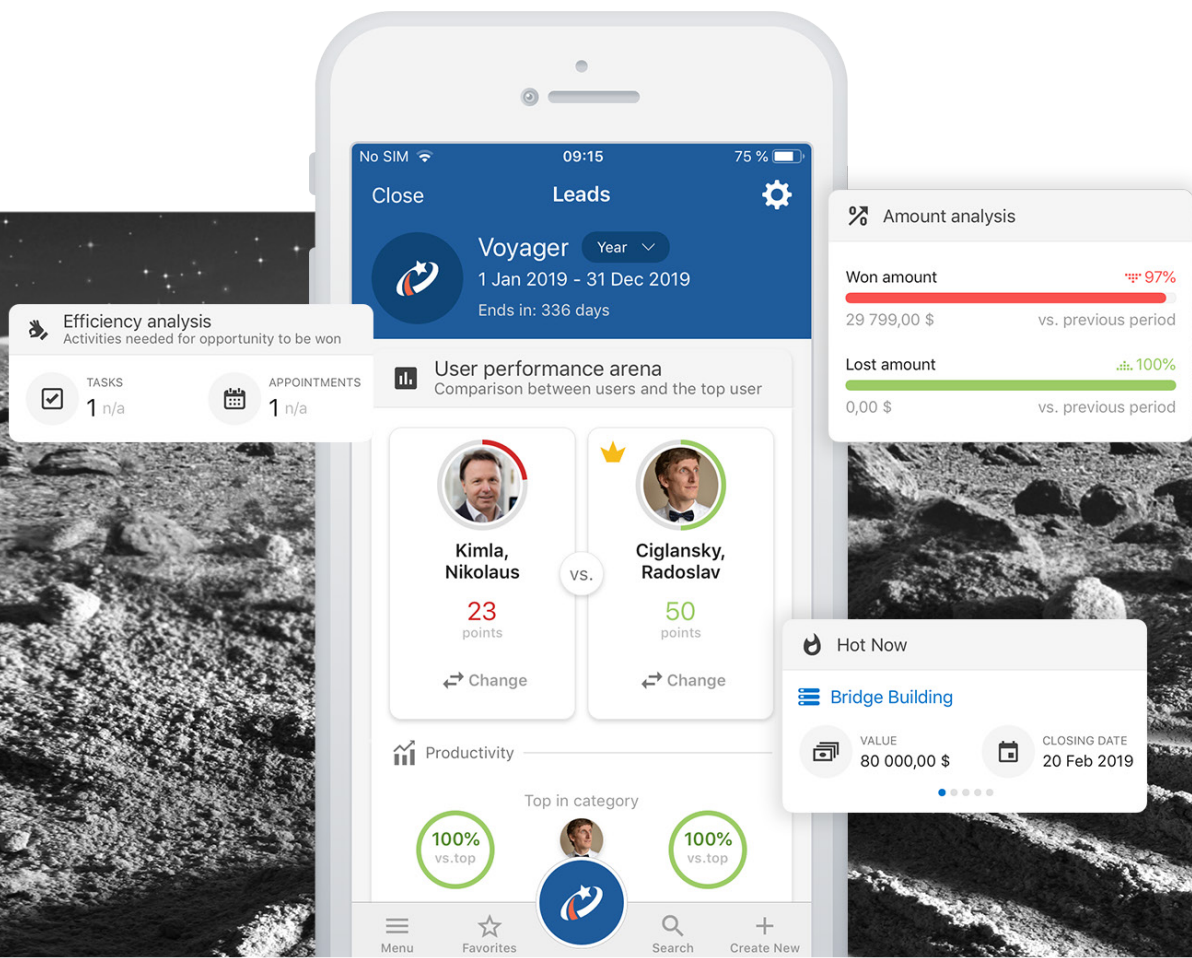
LEADS

Leads are the lifeblood of any sales organization, for without them, opportunities never happen. For leads, Voyager AI guides you with three views:

Productivity—Showing how quickly a salesperson or a team is qualifying leads and completing tasks, as compared with the previous sales period.

Velocity—Shows how fast a user or a team is qualifying leads and completing tasks.

Efficiency—Shows how much (or how little) effort goes into qualifying a lead. For leads, the "quick status" allows you to view these three metrics all on one screen, color coded for instant comprehension.

As with opportunities, you can drill down into analyses from each of these metrics for a more granular look at the data.

ACCOUNTS & CONTACTS

The view for Accounts and Contacts is Winning Percentage, which compares a salesperson's a sales team's revenue from opportunities to the previous period. The Quick Status shows you an instant, color-coded graphic.

You can drill down to the Winning Percentage analysis, which will provide more granular insights into a salespersons's or sales team's performance as regards to accounts and contacts.

Reach for the stars! Put Pipeliner Voyager AI for Mobile CRM to work for your sales team today.
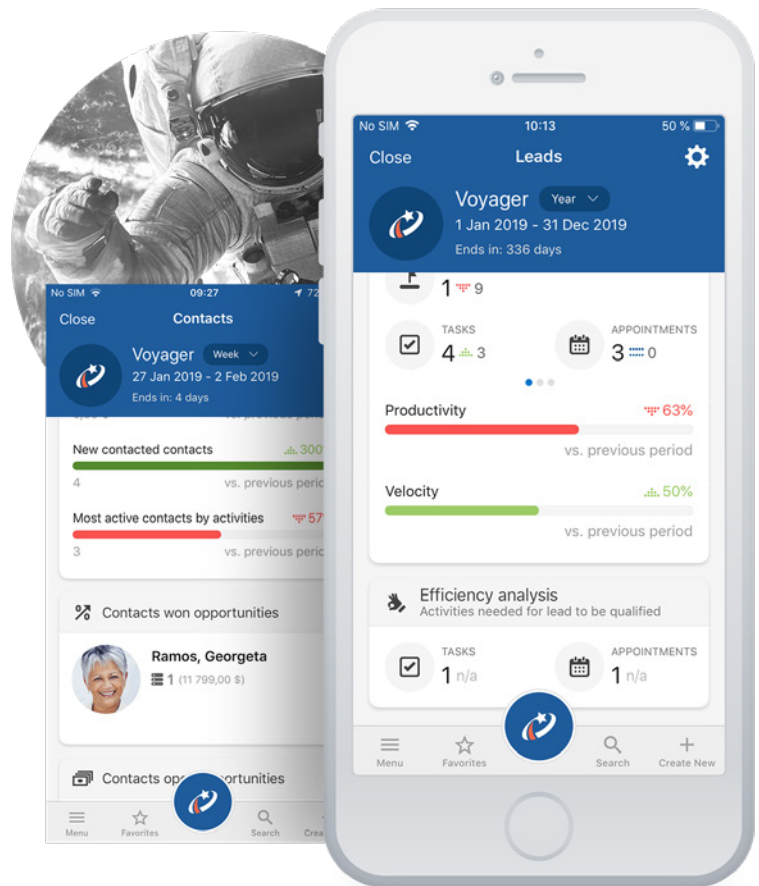
The Pipeliner Universe

SUPPORTING SALES IN ALL ITS FORMS.
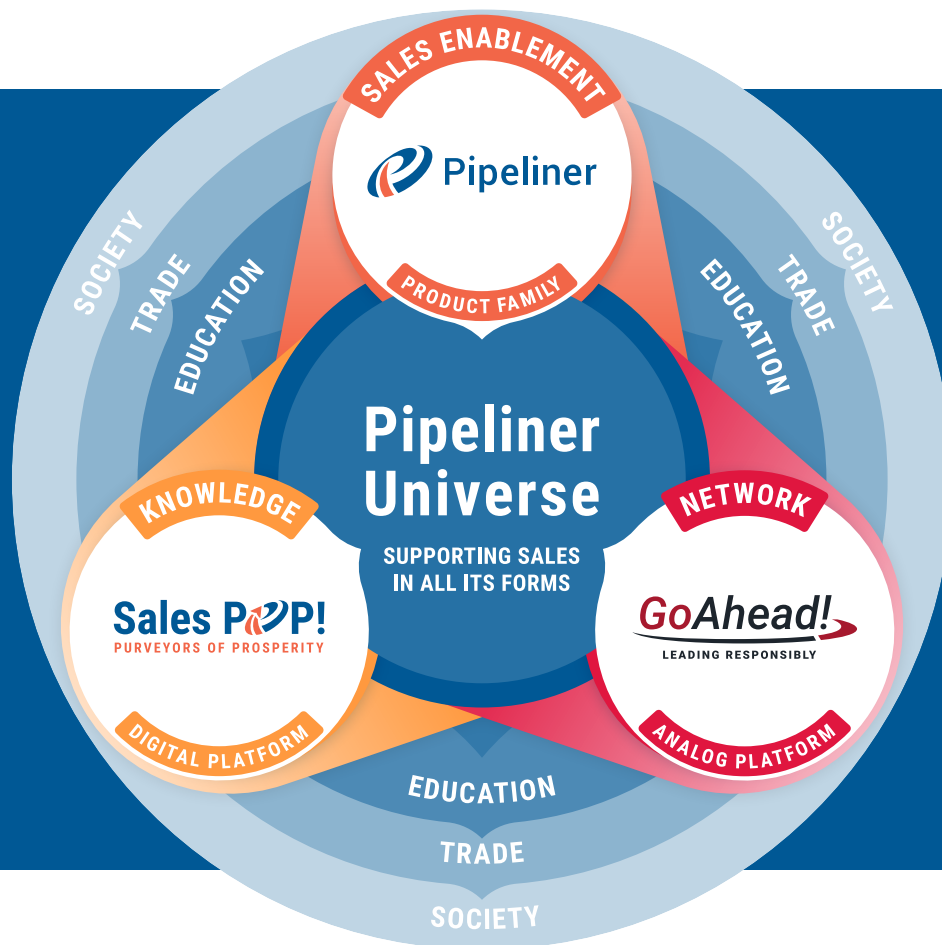
Pipeliner CRM

Pipeliner CRM is a technology platform built to enable Salespeople & Sales Managers to effectively & efficiently manage their pipeline and drive increased revenue. The combination of its intuitive interface and sophisticated backend, Pipeline CRM delivers *Instant Intelligence, Visualized* to give sales organizations a competitive edge.

Sales POP!

Sales POP! is a digital content platform that delivers the best in sales and sales-related content and thought leadership to readers across the globe. Its unrivalled and growing network of contributors brings different, unique perspectives and insights on today's sales & business issues. By leveraging multiple content formats from written, graphical, video & audio, Sales POP! appeals to the widest audience possible.
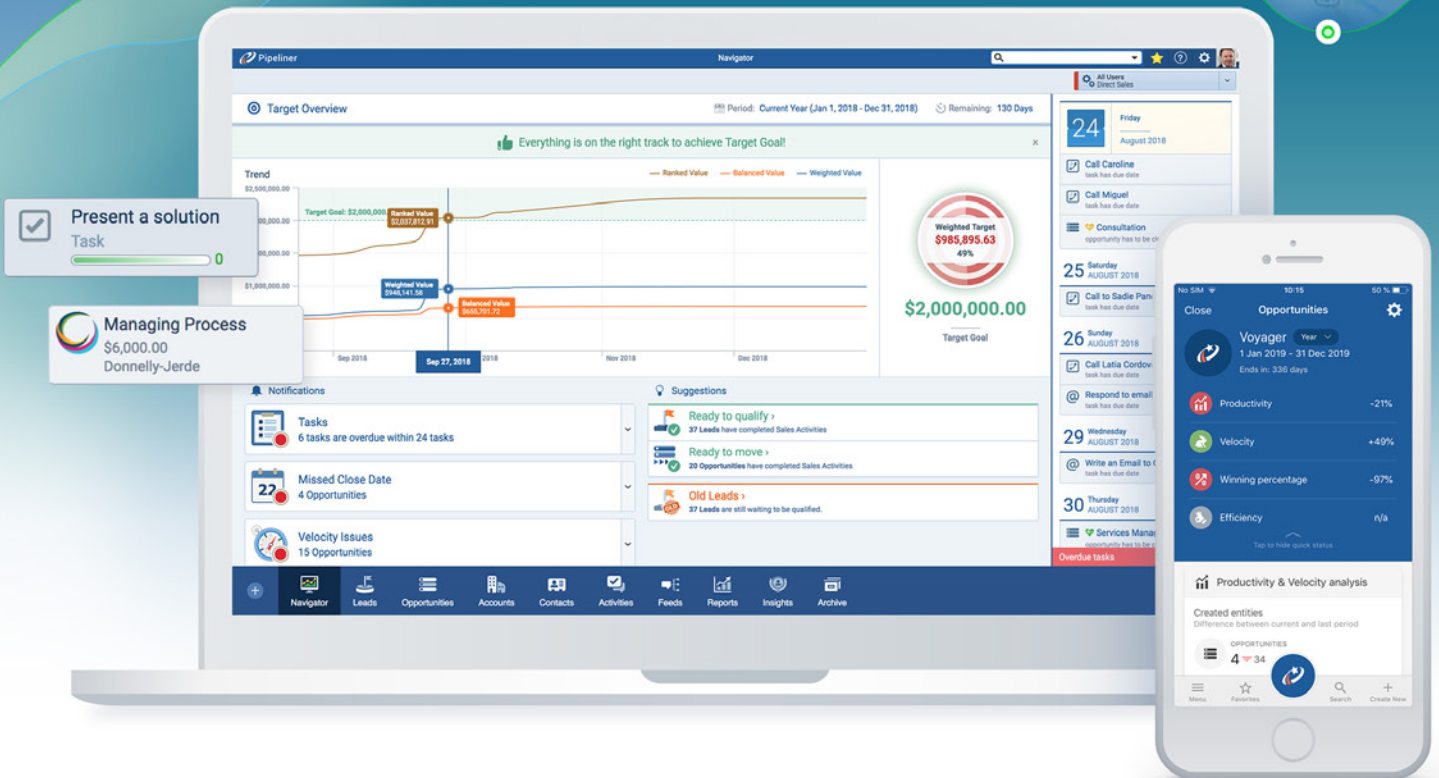
Go Ahead!

Go Ahead! is an analog in-person networking platform where top speakers in cities across the globe deliver valuable, insightful talks to local audiences. These events serve as a way of keeping face-to-face networking alive and flourishing and provide a much needed alternative to the increasingly online and sometimes impersonal interaction that has become prevalent but not always preferable.

GET MORE INFORMATION

Pipeliner CRM

ENABLING SALES TEAMS, MINIMIZING RISK!

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