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## **Abstract**

Most mobile marketing campaigns target the mobile device user as the recipient of marketing information, but sales and marketing professionals may also use the devices to disseminate marketing information more effectively. Need Based Calling software<sup>1</sup> is designed to intelligently automate outbound calls on PDA phones allowing users of smart phones to make smart phone calls. Upon activation, the software creates a queue of phone calls to be made and then automates the process of dialing the contacts in the queue one after the other. After each call is completed the PDA screen shows the information for the next call in the queue and, after a brief delay to allow the user to read about who they're calling and why, dials the contact. The software uses two types of outbound calling queues – known as the Auto Call queue and the Oughta Call queue – to sequentially place phone calls based on time, place and market changes. Many customer relationship management solutions trap the user behind a computer screen; they keep the mobile professional immobile and out of touch with customers. Need Based Calling is designed to work with an enterprise CRM solution to encourage direct customer contact. By automating the process of calling important contacts, the mobile professional gets the convenience of email with the power of human voice. Such a system, wirelessly connected to a corporate network, can extend the reach of mobile marketing programs by pushing marketing program information, timely offers, and potential contact information onto the mobile device allowing the mobile professional to call a series of qualified prospects at the push of a button. The system can also facilitate face-to-face meetings by placing calls to contacts in the mobile device's vicinity. Finally, by copying call log information from the PDA phone to a web-enabled database, the system can close the CRM loop showing not only which customers were to be called, but whether or not they were successfully contacted, when, and for how long. These logs can help monitor a customer acquisition and retention campaign by reporting number of calls made per day and average length of call.

## **Staying Connected in a Disconnected World:**

### **Building And Maintaining Relationships**

Sales and marketing is the process of seller and buyer making a connection, building a relationship, and finding a way to get to “yes.” Sales people connecting directly with prospects and customers is the key, and despite the rise of the Internet, email, SMS, and instant messaging, most products and services still require the personal touch of a sales person to make a sale. The competitive world of high-end enterprise sales with key accounts requires a high-touch approach to effectively recruit new customers and retain existing customers. A wide range of small and medium-sized businesses such as home health care services, recruiting, public relations, customer service, and fundraising also require a personal touch. All of these businesses most likely have a defined process for sales, demand generation, and lead generation. In these cases, extending the reach of customer relationship management processes and marketing campaigns to include the mobile sales force can make all the difference in the company’s bottom line.

In addition, a growing number of self-employed people find themselves struggling to build and maintain a sales pipeline. People with a ‘technical’ skill to offer like CPAs, consultants, writers, programmers, graphic artists, photographers, interior designers, and general construction contractors need to be expert in their field, but they also have to be effective sales people. A solution that helps them stay in touch with prospects and customers can determine whether or not their business can survive at all. The key to building and maintaining successful relationships is staying in touch.

### **The Direct Communications Mix**

The mix of media for direct communications is expanding. More traditional media include mail, telephone and fax. Newer media include email, SMS and instant messaging. As new technologies emerge, they are greeted warmly but soon lose their luster. A recent eMarketer article discussed how the average business worker receives 134 emails every day (most of which is spam) while the average AOL user receives 56 emails daily.<sup>ii</sup> And the problem is getting worse. eMarketer estimates that email volume in the U.S. alone will rise from over 2 trillion messages including personal, commercial, and spam, to over 2.7 trillion messages. eMarketer, in their

report entitled, *E-mail Marketing: How to Improve ROI*, emphasizes that “the increase in email volume works against marketing efforts. According to Return Path, 60.1 percent of U.S. consumers simply deleted additional emails in order to cope with the increase of messages during 2004’s holiday season.” A recent MSNBC article says that “Much like home postal boxes have become receptacles for junk mail, bills and the occasional greeting card, electronic mailboxes have become cluttered with spam. That makes them a pain to weed through, and the problem is only expected to worsen as some e-mail providers allow online marketers to bypass spam filters for a fee.”<sup>iii</sup> The article goes on to say that “many people often don’t respond to e-mails unless they have to.” Smart businesses need to be careful about how and when they use email to reach out to prospects and customers.

At the same time, CTIA says that U.S. operators are experiencing a 71% increase in SMS traffic in June 2006 over June 2005 to 12.5 billion messages<sup>iv</sup>. None of these sources suggest that email, text messaging, or instant messaging are going away. Instead they emphasize that each has its unique benefits and challenges, and that smart marketers need to choose the vehicle that is best suited to the marketing objective. And voice has its place in this mix as well.

While email, text-messaging, and instant messaging are on the rise, they have their limitations. It can be challenging to convey tone and humor in emails and countless people have had to backtrack or explain what they really meant in an email after a firestorm of unintended response. Text-messaging and IM are short-hand communication methods that can’t convey complexity very easily. None of these virtual communication methods allow both parties to simultaneously assess the subtleties of a live conversation during which tone, pauses, and emotion can be used to communicate effectively.

This ability to convey emotion is so critical in the sales process where buyer decisions are very often based on emotion. A sales person who can tell whether a buyer seems worried, concerned, anxious, excited, or confident and respond appropriately in real time is going to be more likely to uncover qualified prospects, and get the appointment, the sale, or the referral.

## **A Numbers Game**

Large businesses and the self-employed have the same challenge: achieving sales numbers comes down to managing the sales pipeline. Smart organizations will have some kind of process

to help them break down their annual sales goal into activities such as presenting proposals to customers, calling to get appointments to make proposals, calling to qualify leads, etc., until they are able to define the actual number of conversations required daily to reach the annual sales goal.<sup>v</sup> For some businesses a sales person will need to make 10 or 15 calls a day, while others will require 50 or even 100 calls per day.

Knowing how many calls to make is only a small part of the battle. The bigger challenges are knowing who to call, what to call them about, and then actually making those calls.

And it's not easy; there are plenty of obstacles to success.

Some of the key factors that keep even the most motivated people from making the right calls to the right people include a general inability to organize activities, a lack of a defined process or system to drive outbound sales call activity, inadequate hardware and software capabilities, and poor quality of contact information. The result is that many mobile workers are not making the number of calls per day that they need to be successful.

*Knowing how many calls to make is only a small part of the battle. The bigger challenges are knowing who to call, what to call them about, and then actually making those calls!*

## **The Challenge of Staying in Touch**

Sales people know they need to make a lot of calls and they may even know the specific number of calls they need to make. However, when it comes down to actually making those calls they run into problems. It's easy to spend valuable selling time on activities that seem important in the moment. Classic time wasters that keep even the best sales people from making important phone calls include:<sup>vi</sup>

1. Getting caught up in customer "emergencies"
2. Getting bogged down in paperwork and email
3. Struggling to know which customers to call
4. Getting caught up in office conversations or personal activities
5. Getting sidetracked by non-money making tasks

Even sales people who manage to avoid these time wasters and are ready, willing and able to make the calls can still struggle. It takes time to find a contact and the appropriate phone number while on the go. Imagine that a sales person has managed to connect with the customer and then has to stop to write down notes in a notebook or on a scrap of paper, and then start

the process of finding the next priority contact and phone number all over again. What these sales people really need is a way to become more productive. And what their companies need is a way to effectively track the outbound calling activities of these mobile sales people who are disconnected from the company's customer relationship management software.

Now imagine that we are not talking about a veteran sales person, and instead we are talking about the average self-employed CPA, programmer, attorney, or graphic artist who would rather be doing just about anything than making phone calls to customers. Most self-employed people would rather exercise their skill than try to sell it. These are the people who need the most help in maintaining their sales pipeline. The great scourge of all self-employed people is the fact that while they are generating revenue they are not generating leads. When a project ends they get paid and find that they have several months of selling to do before they can start their next project. Just an hour or two a week spent calling and talking to potential clients can mean the difference between a successful business and a failure. These people need help overcoming what is known as call reluctance; they need help motivating themselves and monitoring their activities.

Veteran or not, all sales people need help maintaining quality contact with their prospect pools and existing customers and tracking their progress in the daily numbers game that is the essence of the sales approach.

## **The Rise of the PDA Phone**

A recent wireless carrier promotional offer attempted to sell customers a bundle of services to help them get more out of their cell phone<sup>vii</sup>. This new service bundle lets users download songs, get access to TV shows and movies, surf the web, send emails and instant messages, navigate using GPS, and download video games – all on the users mobile phone! Clearly, cell phones today have advanced to the point that almost anything is possible. And this is great news for mobile marketing campaigns targeting the mobile device user because it makes it easy to push all kinds of marketing content at target buyers.

Surprisingly, the wireless carrier promotion made no mention of tapping into the power of the cell phone as it was originally intended to be used – as a device to make calls to other people. As we begin to think of our mobile phones as tiny computers offering up data and multimedia

content, it becomes easy to overlook the inherent power of the mobile phone. Today's mobile phone technology – and specifically PDA phones that marry the features of a phone with the capabilities of a computer – if used effectively, provide a tremendous opportunity for the mobile PDA phone user to be the originator of – or an extension of – a mobile marketing campaign rather than just the target.

The rise of the PDA phone gives us an opportunity to think differently about mobile marketing campaigns in general. A mobile worker empowered with a PDA phone running the right kind of software can extend the reach of customer relationship management software and enhance the power of mobile marketing campaigns by making it easier for sales people to reach out personally to prospects and customers.

## **Making Smart Phone Calls From Your SmartPhone**

NBC software is designed to help enterprise, small and medium-sized business, and self-employed workers improve business productivity by enabling PDA phones to automate outbound calling to ensure high-touch customer interactions. This personal approach is key to extending the reach of CRM software and enhancing the power of mobile marketing campaigns. Need Based Calling outbound calling software provides an organized, automated approach, using technology that is familiar and available to proactively drive outbound calling to ensure that relationships are maintained and expanded. Need Based Calling software is currently being developed and is in beta testing trial.

Need Based Calling is designed to use a PDA phone to create two types of queues to help mobile professionals make phone calls. If the list of contacts is static, the user can create an Auto Call queue. An Auto Call queue acts like speed dial, but calls a group of contacts in succession rather than just one individual. This type of call queue is simple, but the content is tiresome to retrieve and dial.

Other calls are based on changing circumstances like current location, or the last date of contact for a colleague or client. This dynamic list – the Oughta Call queue – spurs mobile professionals into action by placing calls based on these prioritized needs rather than by personal preference.

## **The NBC Auto Call Queue: Quickly Dial A Static List Of Contacts**

### **NBC Local Auto Call Queue**

The Need Based Calling **Local Auto Call Queue** is defined by the mobile professional using the NBC software resident on the PDA phone. An example of a local queue might be a list of parties interested in a particular contract. Imagine a venture capitalist who needs verbal confirmation from two lawyers, three accountants, the owner of the company, and four partners within the venture capital company before making a revision to a contract. This entire group must be called and each person must be spoken to before amendments can be made to the contract. Imagine further that changes are requested every other day! The **Local Auto Call Queue** acts like speed dial, but for a group of people rather than an individual.

Another instance where a **Local Auto Call Queue** can be very valuable is in project management. When dealing with project teams it is essential to manage critical path roles; live conversation can be essential to gaining commitment to meet project timelines. Using the Need Based Calling **Local Auto Call Queue**, a mobile worker can dial each person in quick succession and have a voice conversation. Conversing directly with individuals can provide a better understanding of the potential risks to achieving project goals.

### **Remote Auto Call Queue**

The other type of NBC Auto Call queue is configured using Need Based Calling server software by a manager rather than the individual mobile professional. **Remote Auto Call Queues** are downloaded whenever the PDA phone has a connection to the internet either through wireless LAN, cell phone network or while resting in a cradle device. For instance, managers can use the **Remote Auto Call Queue** capability to push sales contact lists to a new salesperson's PDA phone along with a script to guide the salesperson in requesting a face-to-face meeting to discuss new products and to get to know one another.

Another example: a marketing department has identified customers still using an obsolete version of software. Sales managers can use the NBC **Remote Auto Call Queue** capability to authorize the download of marketing information to the PDA phones of all members of the sales team. The **Remote Auto Call Queue** can be configured to contain the names, companies, and phone numbers of these customers as well as information about a special deal on the most

recent version of the software if the customers agree to upgrade. Need Based Calling software then automates the process of calling each of these customers in turn.

The NBC **Remote Auto Call Queue** may also be used by a company's prospecting department to get qualified leads to the sales force in a timely manner; a political canvassing group to send questions to local political pollsters; or a home health care agency calling subcontracted temporary care givers with specific qualifications to fill a client's request.

### **Distributed Call Center Agent Queue - Extending The Reach Of Mobile Marketing**

The NBC Distributed Call Center Agent Queue is a NBC feature that helps companies extend the reach of mobile marketing campaigns by facilitating direct sales calls. For example, an online clothing retailer may have local sales representatives with limited inventories who can visit people in their homes and show them products that don't sell well online. Imagine a new leather jacket that focus groups absolutely loved. Everyone who tries it buys it. Unfortunately, everyone who doesn't try it doesn't buy it. A traditional sales call is required to move a product like this. A sales person working for an Internet distributor can call people in the neighborhood, help them create an online model to facilitate future online purposes, and show them products that don't sell well online. The personal shopper idea is typically restricted to a brick and mortar department store, but this type of highly distributed call center with agents who can work well in person as well as on the phone can be made cost effective using PDA phone technology.

### **The Oughta Call Queue: Dynamic Outbound Calling**

#### **Keep In Touch Queue**

In contrast to the Auto Call queue, the NBC **Oughta Call Queue** is dynamically generated depending on different conditions. There are several different configurations of the Oughta Call Queue. The first is the NBC **Keep In Touch Queue** which is a dynamically created queue based on date. For example, the NBC Keep in Touch Queue can be configured to require that a mobile professional contact a customer every 30 days, or 30 days before the close of the fiscal quarter, or 3 weeks after a hardware installation, or one week after a direct mail campaign has completed.

All professionals have contacts like Chatty Kathy who wants to talk and talk and talk all morning; or Loudmouth Larry who just wants to talk about his latest golf game. There is an old Latin epigram translated into English by Tom Brown:

I do not love thee, Dr. Fell,  
The reason why I cannot tell  
But this I know and know full well,  
I do not love thee, Dr. Fell.

For whatever reason there are people a salesperson simply does not wish to speak to despite their importance. Even more strangely, a salesperson may have a strong connection with a certain customer and enjoy speaking to them. But due to relationship complacency, the calls to that customer become less and less frequent. In a very short period of time the relationship can crumble.

A Keep In Touch queue allows the mobile professional to set a time period within which they must speak to a particular contact. If the contact calls spontaneously or if a call is made manually within that time, Need Based Calling will reset the clock. Without NBC software and the Keep in Touch Queue, mobile workers may overlook important customers and miss critical opportunities to engage with them. This capability is an example of how NBC software helps mobile workers make the calls that are most critical to their business success.

### **Face To Face Queue**

Another type of dynamic calling queue is based on the current location of the phone. This queue is known as the NBC **Face To Face Queue** since it is used to help facilitate face to face meetings with contacts with whom the mobile professional has existing relationships. The **Face To Face Queue** is a powerful feature of Need Based Calling software running on a PDA phone.

Traditional outbound call centers can only work with centralized data – not decentralized data like the location of the phone. The standard mobile phone lacks the information processing capabilities necessary to ‘remind’ us that a customer is nearby. A PDA phone, however, is capable of determining a mobile worker’s present location and can dynamically generate outbound calls based on contacts in the vicinity.

Need Based Calling uses geocoding to transform addresses into latitude and longitude. Upon request, Need Based Calling scans through the latitude and longitude of each contact and

compares it to the phone's current latitude and longitude. An executive traveling internationally will have a different definition of 'near by' than a sales rep servicing local convenience stores so the user can decide whether someone who is 5 miles away is near, or if someone who is 50 miles away is near. As the queue is processed, the mobile professional is able to speak to clients and offer to bring by a coffee, drop off some brochures or show a new product. These dynamically created calling queues can help mobile professionals create opportunities for face-to-face meetings.

### **All Dressed Up And Nowhere To Go Queue**

Another NBC Oughta Call Queue is a dynamically created queue based on location – but in contrast to the Face to Face Queue – this queue consists of new contacts downloaded from sales lead subscription service.

Mobile professionals who travel to meet a client and find out that the client is suddenly unavailable can use NBC to make valuable use of this unexpected downtime. The mobile user can configure NBC to immediately create a call queue of all of the clients who are within, say, 10 miles. The odds are that a mobile user will be able to get a meeting with someone on a list of 10-12 clients spontaneously.

If Need Based Calling searches through a user's contacts and finds none within a specified distance, the user can wirelessly request a list from a company that provides sales leads. The user must have an account and set up a profile for each client, e.g., "biotech companies with 5-50 employees." When the PDA phone connects to the web service that provides sales leads, it authenticates the user using its hardware device identification and/or telephone number. The software also passes along the user's location. An XML call queue is downloaded and parsed so that the phone can immediately begin dialing through potential customers in the user's immediate vicinity. After a few phone calls, the user should have made direct contact.

### **Measure Your Success**

Customer relationship management solutions can help companies of all sizes manage their customer relationships in an organized way. CRM solutions can help companies integrate the activities of marketing, sales, and customer support by helping identify and target customers,

manage marketing campaigns, generate leads, and optimize account management and order processing. However, most CRM software solutions extend only as far as a sales person's computer screen. Once the laptop is closed and the sales representative is out in the field meeting with clients and relying on the mobile phone to make contact, the company loses access to valuable information about sales activity and customer contact information.

A recent Aberdeen Group report discusses a new wave of sales productivity solutions designed to close the CRM gap:

“CRM alone, however, does not address all of the sales lifecycle challenges faced by many end-users—hence the resurgence of interest in sales productivity tools designed to close this gap.”<sup>viii</sup>

There are a growing number of solutions designed to increase user productivity by either complimenting or integrating with an organization's CRM software. Need Based Calling software helps close the gap between CRM software and field sales activity by helping organizations capture and report on information about field sales activity.

PDA phones running Need Based Calling software record call logs that list call dates, contact names, and call length in a local XML file. When the PDA phone is connected to the network, these call logs are copied to a backend server. The logs can be reviewed on a web page by the sales person, the sales manager, or anyone in the organization who has been granted access to the data. These logs help organizations compare outbound calling activity to revenue generation results.

This process of reviewing call logs is a critical addition to traditionally desk-bound CRM solutions because it allows organizations to track activity that is disconnected from the CRM software. A salesperson using only a CRM solution can arbitrarily change the status of a deal in progress and sales management has no view into whether or not the change is valid. Using Need Based Calling as an adjunct to the CRM however, sales management can see if the customer has actually been contacted and know that changes in status are warranted.

## **Managing Outbound Calling Activity**

While processing a call queue, the application makes frequent calls to voicemail– not to check messages, but to leave them. After two or three calls it's easy to forget action items, so users will need to leave voice notes in a voicemail box. The application can call a user's voicemail, or administrative assistant's voicemail. Users can also subscribe to a transcription service like Need Based Calling's Remote Admin. Voice notes are transcribed into e-mails and sent to the user. Again, if the user has an administrative assistant, the assistant can work on action items regarding setting up a lunch or a meeting for later in the week. When users synchronize their PDA phones, their schedule will be updated without any typing. Users with no administrative assistant can easily transcribe their own voice notes from voicemail or copy and paste Remote Admin notes out of email and into their calendar and task lists.

## **Conclusion and Discussion**

Using PDA phone technology, Need Based Calling provides a brand-new, incredibly productive environment in which to use a comfortable old tool – the human voice. The software is designed to create important opportunities for mobile professionals to increase their productivity and improve their customer service levels. At the same time, NBC software provides important benefits to enterprise, small and medium-business, and the self-employed by extending the reach of mobile marketing campaigns, closing the CRM gap, and providing enhanced reporting capabilities to track customer contact activity.

NBC software provides value for any industry where direct customer contact is an essential compliment to a growing world of virtual communications such as email, instant messaging, and text messaging. When considering deploying NBC software, businesses should evaluate vertical market segments or business processes where increasing high-touch sales contact is critical.

## End Notes

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<sup>i</sup> Need Based Calling software is currently under development and is in the process of beginning beta testing trials.

<sup>ii</sup>

<sup>iii</sup> <http://www.msnbc.msn.com/id/13921601/>, Irvine, Martha. *E-mail losing ground to IM, text messaging*, MSNBC, July 18, 2006.

<sup>iv</sup> <http://www.imediaconnection.com/content/11937.asp>

<sup>v</sup> <http://www.sba.gov/gopher/Business-Development/Success-Series/Vol6/enough.txt>

<sup>vi</sup> Selected items derived from an article by McMahon, Marcella. *Top Twenty Time Wasters for Salespeople*, Positiveresults.com. 2004.

[http://www.positiveresults.com/articles/time\\_wasters.asp](http://www.positiveresults.com/articles/time_wasters.asp)

<sup>vii</sup> Sprint

<sup>viii</sup> Ament, Leslie. *Sales Productivity Tools: Closing the CRM Gap*, Aberdeen Group.

[http://www.aberdeen.com/summary/report/enterprise\\_strategies/ES\\_SalesProdCRMGap\\_LA\\_2482.asp](http://www.aberdeen.com/summary/report/enterprise_strategies/ES_SalesProdCRMGap_LA_2482.asp)