



Mobility: Providing Real-Time Sales Expertise for Channel Partners

By Kerry Doyle

Channel Partners[™]

Channel Futures[™]

Mobility: Providing Real-Time Sales Expertise for Channel Partners

By Kerry Doyle



FEBRUARY 2018 | US\$25 | S020218

Channel Partners™
Channel Futures™

Table of Contents

Gaining the Mobile Advantage **5**

End of the Traditional IT Sales Model? **6**

In the Channel: A Slow Transition
to Digital Services **7**

About the Author



KERRY DOYLE has written for a diverse group of companies based in technology, business and higher education. His expert analysis of new trends and technologies stems from senior editorial positions early in his career at PCWeek, PCComputing, ZDNet and CNet.com. He covers a diverse range of topics, from nanotech to the cloud and open source to big data, for a number of publications, including Wall Street Journal Custom Studios, FORTUNE/Time, Forbes and IDG.

 [linkedin.com/in/kerrydoyle/](https://www.linkedin.com/in/kerrydoyle/)

 [@technokerry](https://twitter.com/technokerry)



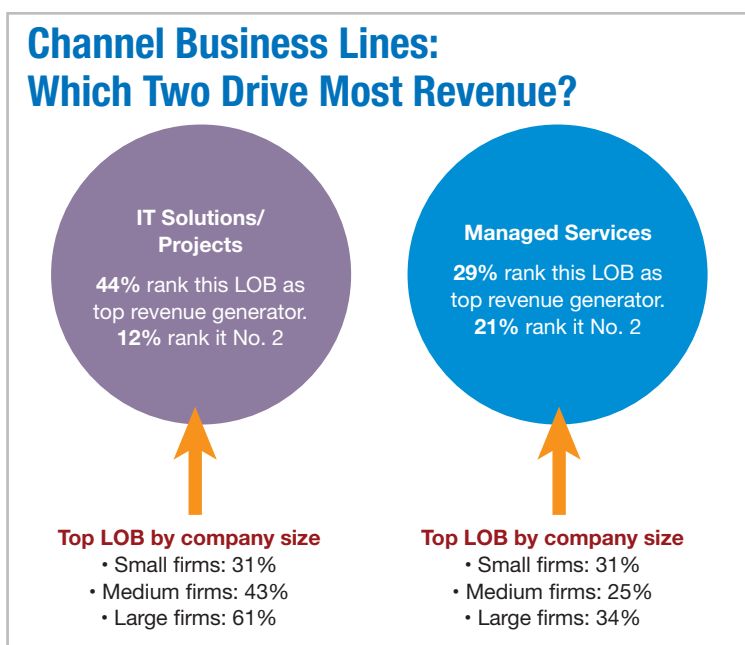
Mobility: Providing Real-Time Sales Expertise for Channel Partners

GROWING IT COMPLEXITY, SUCH AS MANAGING MULTICLOUD DEPLOYMENTS AND GREATER RELIANCE ON INTERNET

of Things connectivity, offers key opportunities for channel partners. But it's a complex seller landscape that offers great potential, as well as pitfalls. And success will partly depend on the effective use of mobility.

Access to mobile apps and a comprehensive CRM platform can provide agents with a direct line to their selling base along with tools for training and post-engagement follow-through. For example, data on the purchasing habits of potential customers can help agents tailor their sales approach.

“From a seller standpoint, adopting a mobility model as soon as possible is going to help them not only leverage the existing trend we see in the market, but also out-compete other organizations that aren't yet doing that,” according to Harish Sathisan, director of mobility solutions at [Tech Data](#).



Source: CompTIA's Trends in Managed Services 2016: Base: n=400 IT channel firms

In this report, we look at the expanding role of mobility in helping agents identify key business decision-makers, as well as establish credibility as a trusted seller of managed services. We also explore the potential for mobility to modernize the sales process through access to a range of tools that interact with CRM, AI and mobile analytics.

Gaining the Mobile Advantage

Often one of the biggest challenges agents face in the field is being adequately prepared with client knowledge in advance of a meeting. The ability to gain fresh insights on the fly, in real time, can be a critical differentiator from competitors. For example, agents can use mobility as a pathway to better understand a key technology or quickly come up to speed in regards to a client's unique requirements.

Increased mobility also offers a means to better manage ongoing customer engagement and expectations from end to end. "There needs to be a common platform that gives agents access to important data, both when they're preparing, as well as when they're engaging the client," said Paul Cronin, senior vice president and facilitator of excellence for the managed services provider [Atrion](#). "You never know what conversations are going to come up, so the more data that's available to agents, the better."

During a client meeting, mobile connectivity to a unified platform can help establish credibility by providing access to experts. With key decision-makers present, an agent can instantly contact an engineer for technical expertise on how a service offering can meet a client's unique needs.

Or as part of a preplanned approach, an agent can video conference in a solution architect to explain key aspects of a proposal in greater depth. One criteria for more effective use of mobility is that agents must be willing and able to evolve, adopting new apps and productivity tools as they become available.

“Operating at light speed are those agents that are really connecting with their customers and becoming a go-to asset,” said Rick Beckers, president and CEO of [CloudTech1](#). “Those customers are actually witnessing how that agent is able to contact some very knowledgeable people quickly and get the answers they need in a timely fashion.”

Instant access to online resources also makes it possible for sellers to engage in self-help on the spot or share relevant case studies that not only address key business problems, but also solve a client’s specific issues. Agents can also use mobility to access more in-depth solution knowledge, stay current with new product iterations or participate in webinars and seminars from anywhere, at any time.

“We truly try to understand someone’s business, their goals and what they’re trying to accomplish,” said Shane Stark, director of vendor and channel relations at Carrier Access Inc. “Before you offer any solution, you really need to understand what that client does and what makes them successful.

“That is, entering a business conversation as opposed to strictly talking about your product line. Our agents don’t talk about products until we’ve provided the solution to that client’s issues.”

Agents can also use mobile collaboration tools to create a virtual team environment, strategizing client approaches with the seller and the actual solution architect ahead of a meeting. Similar mobile advantages exist post-engagement where agents can quickly input client-related information into a mobile-accessible CRM platform to help move the selling process along.

For example, an agent can register the prospect as an opportunity that requires immediate attention, create a follow-up client proposal or book an order. Finally, multiple line-of-business end users can access that platform to add further details to prospect profiles, helping sales teams sell more effectively.

End of the Traditional IT Sales Model?

A changing buyer’s landscape has further complicated the selling process across the telecom sector. In terms of current technology purchases, LOB executives are now making two-thirds of technology purchases. According to Forrester Research, 29 percent of those decisions circumvent internal IT, because those [decision-makers prefer not to be slowed down by due diligence and other guardrails](#).

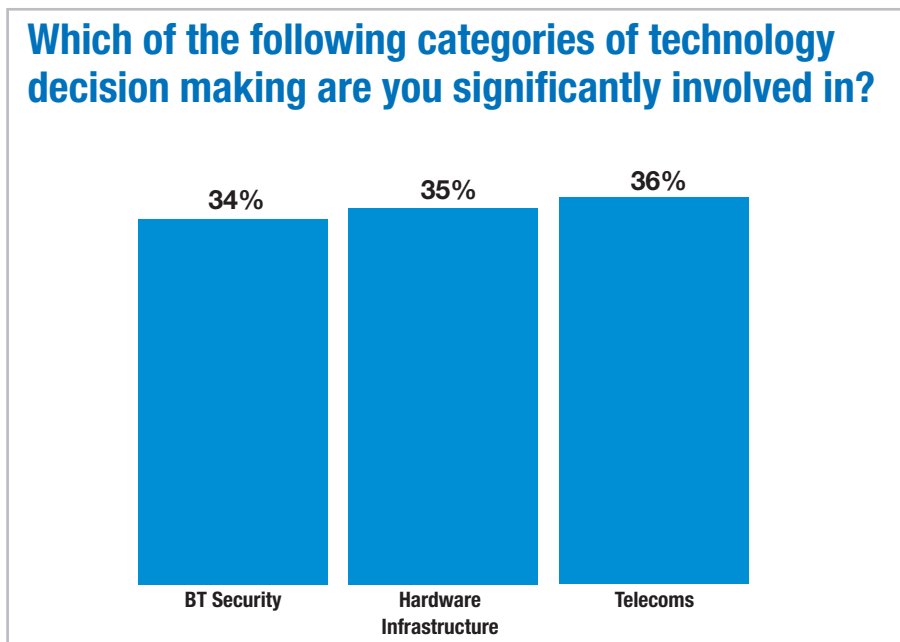
In many instances, these executives are bringing in aspects of the broader communications market as a back end to their projects. For example, a large technology initiative undertaken by a vice president of media marketing might include a small call center, with its accompanying connectivity and security requirements. Increasingly, these kinds of projects are undertaken without involving traditional communications agents.

Moreover, while a vendor representative might have substantial contacts within an enterprise, the list of new buyers continues to grow. “There are many different stakeholders today who are decision-makers. Sellers, on the other hand, tend to approach the people they know. Maneuvering around those people can cause issues because it could seem like an agent is breaking a trusted relationship,” said Cronin.

In this new scenario, customers are not only constantly changing, but their scope is also broadening. It's becoming harder to identify the key decision-makers. To further complicate the picture, B2B customers overwhelmingly prefer to research and buy products and services via a self-service tool, website or mobile device, [according to data from Forrester Research](#).

In the Channel: A Slow Transition to Digital Services

While the use of consumer mobility is widespread, for many channel partners true mobile capabilities that offer both seller- and customer-facing functionality are works in progress. In general, a significant portion of these organizations are moving slowly toward providing the level of digital capabilities customers in the field require.



Base: 1,205 global services business decision-makers (multiple responses accepted)
Source: Forrester Data Global Business Technographics® Business And Technology Services Survey, 2016

“Agents need access to two sides of the data equation: They need access to real-time systems and all customer information along with global management capabilities,” said Jay McBain, principal analyst, global channels at [Forrester Research](#). “At the same time, agents require every piece of information about their vendor so that they can connect the two systems.

”If agents do have access to either an app or a mobile platform, it’s not polished to the point where it’s more efficient to use as opposed to relying on their own personal tools or contacting someone for information and putting a human in the middle of the process.”

McBain points out that a subset of agents remain wholly unaware that advanced mobile capabilities are even possible. Those who do know about these tools are pushing their vendors to transform themselves and provide the tools that could

make them more successful. That's in sharp contrast to the deployment of more cosmetic apps that include various bells and whistles, but simply aren't robust enough to be effective.

Ultimately, channel partners need to keep up with the rapid pace of digital innovation occurring across every business sector. For example, IoT, AI and robotics initiatives are becoming increasingly viable. "At the end of the day, all of these innovations tie back into carrier activation and give you more opportunities to do that," said Tech Data's Sathisan. He notes investing in these technologies now will only help companies become more successful in the future.

One trend having an impact on sellers [is the growing use of master agents by partners such as VARs and MSPs](#). While once limited to the telecom channel, masters are gaining traction with other players in the digital services sales channel. As mentioned earlier, a key challenge for agents in the channel is to have the depth of information necessary to answer questions and respond effectively at every stage of the sales process. That's

why the master agent model offers such an edge to a whole range of channel partners. These technology specialists can carry and relay all vendor knowledge, as well as pre- and post-sales engineering data to agents in the field via their mobile devices.

“Master agents can almost look like vendors themselves in terms of the platforms they’re building and the IT available to provide resource.” — Jay McBain, Forrester Research

In turn, subagents can become more focused on prospecting, building relationships and gaining credibility as a trusted adviser, while relying on a master agent for deeper expertise. Like distributors, master agents can be buffers between partners and vendors who might be slow to adopt digital services. They can also help build the tools for meeting customer-related enablement.

“Master agents can almost look like vendors themselves in terms of the platforms they’re building and the IT available to provide resource,” said McBain. “No single agent could have the scale or resources necessary to compete at that level.”

In terms of gaining a competitive edge, it's hard to understate the key roles mobile analytics and AI will play in the future. For example, understanding customer buying trends using analytics combined with AI capabilities connected to CRM platforms could help sellers determine the next phase of their customers' buying actions.

These tools will enable channel partners to know everything about how customers purchase and the specific trends related to that process. Then, with mobility in place, agents will better understand how to leverage their position to successfully sell to each unique customer.

Related Reports



[IoT and the Exploding, Mobile Edge](#)

Think about a customer's IoT network as a distributed supercomputer, comprising hundreds or thousands of nodes, all continuously collecting invaluable data, often while on the move. Whether those nodes are self-driving cars, law-enforcement drones or real-time control on a commuter train, one thing is for certain: IoT will change the requirements for always-on connectivity dramatically. Big telcos have beefed up their networks to meet the challenge, but it's up to partners to help customers connect millions of dots. Are you ready?



[Mobility Management Seller's Guide](#)

The work-from-anywhere boom has given rise to a pressing need for mobility management in companies of all sizes. Smaller customers may think they can get by without a formal program. They can't — and in fact, they don't need to. There are mobility management tools and strategies tailored to, and priced for, SMBs. This report will help you make that case.



[Mobility: Plugging Into the API Economy](#)

While the application programming interface (API) isn't new, it is taking on a new level of importance in its critical role in the development of mobile applications. By enabling software programs to communicate with each other, APIs make it possible to integrate resources and build new applications on top of existing services, saving development time and cost, and mitigating the risk of errors. This report examines some real-world examples of API-enabled mobility projects and the opportunities available to channel partners in the API economy.



[Mobility Consulting: Creating Value for Your Customers — and Your Bottom Line](#)

If your mobility practice consists of provisioning data plans and helping customers swap out the last iThing version for a newer model, you're thinking way too small. In this report, we outline the six elements of a successful mobility consulting business.