DANIEL RICHARDSON
FIELD SALES REP

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Daniel is a Field Sales Representative who works for a US-based Internet service provider company. He works in Northern California and his territory consists of the San Francisco Bay Area. He sells Internet services to small to medium-sized companies. He is part of a 12-person sales team that covers the entire California region. He is responsible for generating new sales leads and managing new products and services for current customers.

Daniel spends most of his time working out in the field or from his home office. He visits the company office once or twice a week, which is located in San Mateo California.

Daniel has 11 years experience as a Field Sales Representative, and has been in his current position for four years. Previously, he was a Field Sales Rep for a Telecommunications company. He has a BS in Business Administration.

In Daniel's free time he likes to take his long-term girlfriend to new restaurants and venues in San Francisco. He also is a sports fanatic and goes with either friends or clients to games whenever he has a chance.

PERSONAL CHARACTERISTICS

Daniel is 41 years old and uses his personal charm and good looks in order to help make sales.

His characteristics include:

- Busy and always multi-tasking

- Wants to get things done quickly so he can move on to the next task

- Well-groomed

- Outgoing and very friendly—he has no fear of striking up a conversation with anyone he meets

- He pays attention to details in business and social situations, makes sure to greet people, shake their hand, and engage them in conversation

- Stylish—he has a high-end car to drive in, name brand clothing, and uses Apple products because "not only are they easy to use, they look good"

DANIEL'S TECHNOLOGY PROFILE

Daniel's job is very hectic he doesn't have time to deal with technology issues. He just expects things to "work" and will only use technology when it helps increase efficiency. To him it's all about meeting the client and making the sale. If technology will help support managing the sale and meeting a sales goal, he is all for it. He likes having technology both at home and in the field, and believes it is a life-saver for his job.

Daniel prefers Apple products because he finds them aesthetically pleasing, easy to use, and compact and lightweight.

According to Daniel:

"The most important thing for me is staying connected to my clients, and because I'm always on the move, I rely on my devices to help me get where I need to be and do what I need to do."

DANIEL'S DEVICES

Tablet: iPad4 that his company provided since he is always out on the road. He mostly uses this at client meetings and while stationary in the car or at a café.

Mobile: iPhone 5 that his company pays for, including all the costs associated with the device. He also uses the device for personal reasons. Daniel considers his mobile device as "his end-all-be-all device" since it is always with him.

Other Technologies: Personal 17" Macbook Pro and an Xbox 360 elite.

Laptop: His work laptop is an HP Ultrabook that he uses mainly at home and occasionally at the office. He uses the laptop to create sales presentations, log into his CRM application, and check and write email.

WORK PLACES

Daniel works from many different locations; it isn't as simple as just going to the office each day.

His work locations include:

Car: He uses his car to get from client to client and to get to cafes and to the office.

Office: He goes into the office for occasional meetings, to do miscellaneous paperwork, to meet with colleagues, and to pick up collateral.

Restaurants and Cafes: He meets with clients regularly at restaurants. Also, he often stops at cafes between clients for coffee or lunch and to catch up on some work.

Client Offices: He meets at offices of clients for presentations or meetings.

Home: He reviews his schedule and checks and responds to email (morning and evening). He often reviews a sales presentation before going to visit a client. Also, if he didn't have time while in the field he will access his enterprise sales application to enter information such as notes from client visits, or to enter a new lead.

According to Daniel:

"My car is like another office, I'm always making calls and looking up information."

JOB RESPONSIBILITIES

Daniel has many job responsibilities but it is key for him to build relationships with customers, meet his sales quota, and track what is happening in the field.

His job responsibilities include:

Generate sales leads: This is done by making cold calls, using business directories, word of mouth, or from trade shows and conferences.

Maintain relationships: Maintain relationships with customers by meeting regularly, getting to know the customers at a personal level (birthdays, anniversaries, kids' names, likings—wine, sports, etc.).

Networking: Bringing in new customers is how sales reps create business, so meeting new people and establishing relationships is a priority.

Client meeting preparation: Create presentations, sales materials, proposals, and sales contracts. In addition, review customer information such as install base, hierarchy of people who will be in the meeting, competitor information, and what is going to be presented.

Attend client meetings: Present and sell company products to clients. These meetings consist of giving presentations, reviewing product offerings, up-selling products to current customers, and discussing costs.

Conduct post-meeting activities: Document notes about what happened, perform follow-up action items including things such as sending clients white papers and product sheets, create follow-up meetings, updating the progression of sale in the cycle.

Contract signing: Having customers sign contracts, policies, etc.

Meet sales quota: Achieve the targeted revenue goals with the closure of sales.

Communicate with sales team and management: Attend weekly meetings, with team, communicate new product and service opportunities, and provide updates on sales progress or activity in the field.

Product training: Being familiar with the products sold and with training materials.

LAPTOP TASKS

Daniel mainly uses his mobile devices when possible, but there are a few tasks that he still finds easier to do on his laptop.

According to Daniel:

"Though I can use the iPad for many things, typing is still easiest on a laptop or desktop."
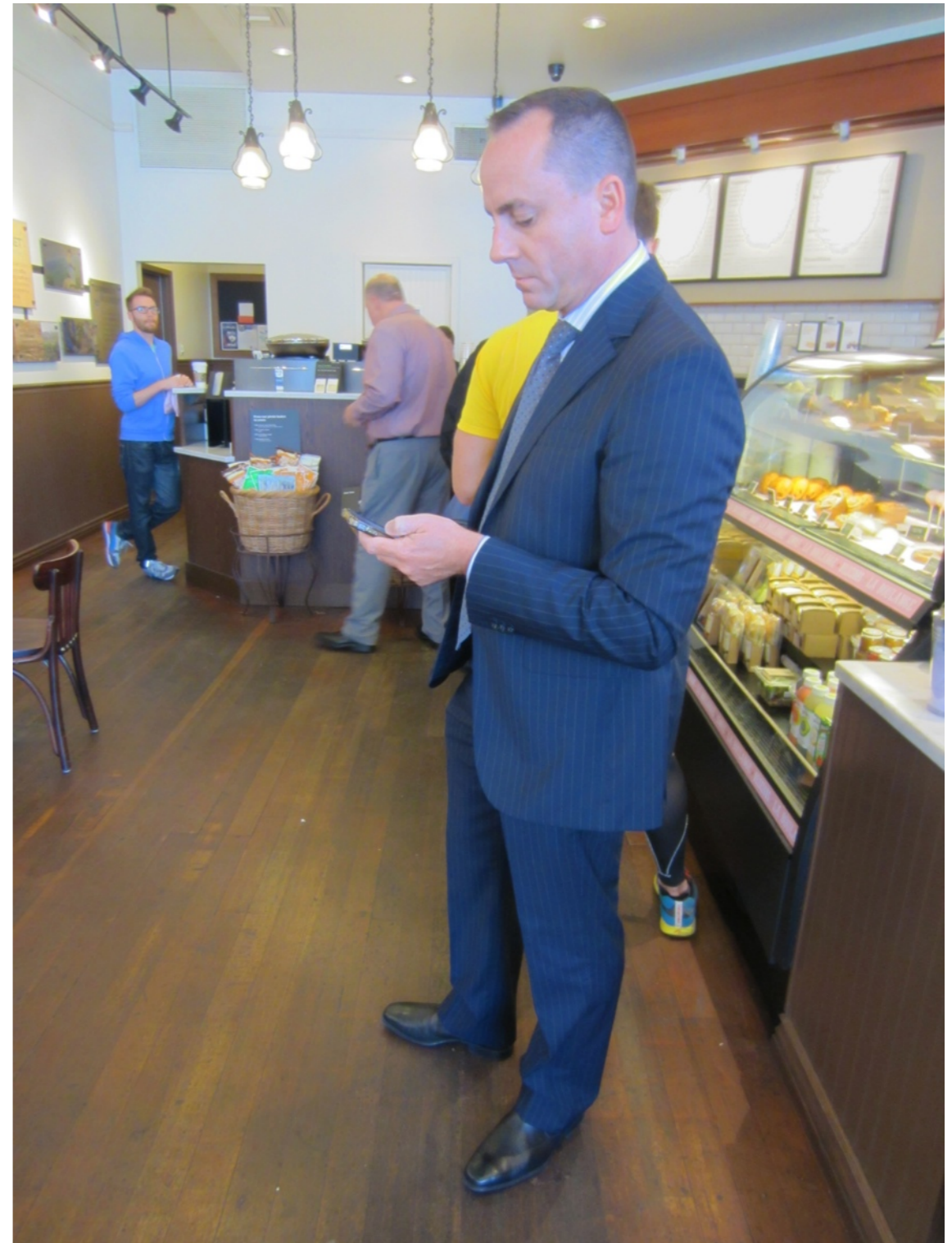
Laptop tasks include:

- Creating sales presentations

- Composing and answering emails

- Logging into the CRM Sales application to manage leads and opportunities

- Using the Internet to look up competitor information and company information for clients

- Review calendar to know where he needs to be next

- Expense reports

MOBILE WORK TASKS

Smartphone tasks include:

- Make and respond to calls and text messages

- Review calendar to see where he needs to be next

- Read and reply to email from colleagues and clients

- Create and manage tasks and appointments

- Create and update leads and opportunities

- Review account information before attending the meeting, who will be at the meeting, products interested, install base, etc.

- View account team information and collaborate with sales team members

- Use GPS to get directions to client

- Review documents such sales specifications

- Take pictures—e.g., of spaces where products would go

- Take notes about client visits

- Review the information about a new client

- Evaluate how close to reaching sales goals/quotas

- Take notes about client visits

- Use Social Networking such as LinkedIn to network with potential and current clients

- Use conferencing tool for voice and videoconferencing with colleagues and clients (Skype Polyconferencing, WebEx)

- Look up employees in corporate directory

- Search for customer/sales opportunity contact

According to Daniel:

"My phone is my mobile office, it's with me all the time."

TABLET WORK TASKS

Tablet tasks include:

- Make presentations to clients

- Use conferencing tool for voice and videoconferencing to meetings

- Review documents (employee performance, etc.) and presentations

- Log into his web-based CRM sales application to look up information, very little data entry

- Taking notes about client meetings

According to Daniel:

"The tablet is extremely useful for presentations and reviewing information."

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MOBILE PERSONAL TASKS

With Daniel's hectic schedule, he finds that his mobile devices provide him an outlet to stay connected with friends and family and be up to date on the most important information going on.

Smartphone tasks include:

- Email, text message, and call friends and family

- Use as alarm to wake him up when traveling

- Staying connected to friends and events going through social networking such as Facebook

- Playing games against friends (Words with Friends, Scrabble, etc.)

- Finding restaurant suggestions and reviews of places nearby to try out

- Read information such as news, blogs, etc.

- Take pictures of friends and family

- Performing tasks such as online banking and looking up public transportation information

- Video conferencing with his family on the East Coast

- Use the Internet to look up sports information, wineries, etc.

- Check stock quotes

- Listen to music

Tablet Tasks:

- Reading books, magazines, news

- Watching movies

- Playing games

- Social media

MOBILE PAIN POINTS

Even though Daniel finds his mobile devices to be lifesavers, there are a few frustrations he faces.

Frustrations include:

- Keyboard is small on a smartphone so it is hard to enter in information, including notes.

- Daniel has connection issues with his tablet from the tall buildings in San Francisco. Therefore, he has trouble accessing his web-based CRM application when out in the field.

- Daniel has to log into the web-based CRM application on both his tablet and laptop, which is not an optimized user experience for his iPhone and iPad.

- Client interactions are taking place through email, calling, and SMS messages. Information is coming in from everywhere and there is no good way to track the information.

- Daniel has problems with the Siri voice functionality that he currently has on his iPhone. Even though he loves the feature, he feels that she doesn't understand him as much as he would expect.

- Battery life is a problem.

According to Daniel:

"I hate entering notes on my phone, so using voice recognition would be great."

WORK APPLICATIONS

Application	Tasks	Frequency
MS PowerPoint	Presentations	Weekly
Keynote (Tablet)	Edit PowerPoints on the go	Weekly
Evernote, Native device note application (Smartphone & Tablet)	Documenting notes while on the go	Daily
Oracle Sales Application (Desktop, Smartphone, Tablet)	Manage leads and opportunities	Daily
Oracle Expenses (Desktop, Smartphone, Tablet)	Enter expense reports	Daily with mobile
Skype (Desktop, Tablet)	Web-conference into team meetings	Weekly

A DAY IN THE LIFE OF DANIEL RICHARDSON

7:30 am The alarm on Daniel's iPhone wakes him up. While he has his phone, he checks for important emails and checks his calendar to remind him where he needs to be for the day.

According to Daniel:

"My phone is with me every step of my day—from when I get up to when I go to bed."

8:00 am He heads downstairs to his home office. He opens up his laptop and emails himself the presentation he will be using at his first client, ACME Corp. This way he will be able to access it on his iPad when he gets there.

8:25 am He grabs his iPad and Skypes into his weekly team meeting. During the meeting all the sales reps from his region talk about the sales that they have made and any issues they are having in the field.

9:40 am Daniel heads out of the house with his iPad, product brochures, and mobile phone. He gets in his car and drives to the Starbucks near his first client visit to grab a coffee and breakfast.

While in the car, which is a 10 minute drive, Daniel multi-tasks. He first receives a call from his colleague Samuel from the product team that is joining him at the client meeting. Samuel called to verify the location and to see if he needs to bring product brochures.

After the call, Daniel remembers that he told his manager during the team meeting that he would send him the quote he gave to Alltek Corporation at the beginning of the week. He doesn't want to forget again, so while at a stoplight he grabs his iPhone, looks up the amount, and sends a text message to his boss. It says "$165,000 for Alltek headquarter offices".

10:05 am Daniel arrives at Starbucks and sits down with his latte and breakfast sandwich. He logs into his Smartphone sales application to quickly review client, Jim from ACME Corporation whom he is meeting at 11 o'clock. He wants to make sure he hasn't forgotten anything.

He reviews the following:

- The meeting attendees

- LinkedIn to see if he has any common connections to the client that he can reference in the meeting. Referencing a mutual contact is an effective way to establish a personal relationship.

- The latest ACME news

- Previous interactions and notes

- Review first-tier service requests and install base

- Determine if there are any other outstanding opportunities with ACME.

10:20 am While reviewing his notes, Daniel is reminded that Jim really likes Napa Valley chardonnays. He uses his phone to check if there are any nearby BevMO! stores that he can quickly go to pick up a bottle before the meeting.

10:22 am He grabs his stuff, heads to the car and drives to the BevMO!, which is a few blocks away.

10:40 am Daniel gets caught in a long line at the store and thinks he is going to be a few minutes late. He first sends a text message to Jim from ACME to let him know he will be a couple minutes late. He then instant messages his colleague Samuel to also let him know.

10:48 am He hops back in his car and realizes that he doesn't know how to get to the client from the wine shop. He enters the address into his GPS and starts driving.

According to Daniel:

"I go to see customers in person. It's relationship building. I see what they're all about and pick up on subtle details. I look at their face, see it in their hands. I find customers."

11:05 am Daniel arrives at the client and sees Samuel and Jim in the office lobby. They greet him and they head to the conference room for the meeting.

11:15 am Daniel takes out his iPad and presents his presentation to ACME.

After the presentation, time is spent whiteboarding a couple different types of Internet connection solutions. Daniel and Samuel are not sure if a certain wiring can be done in ACME's building so they need to call someone from their company who is familiar with the wiring process. Daniel pulls out his tablet where he has to VPN in to his intranet site to find the phone number for Amit, who is in the product technical support group. They call Amit and confirm that the solution will work.

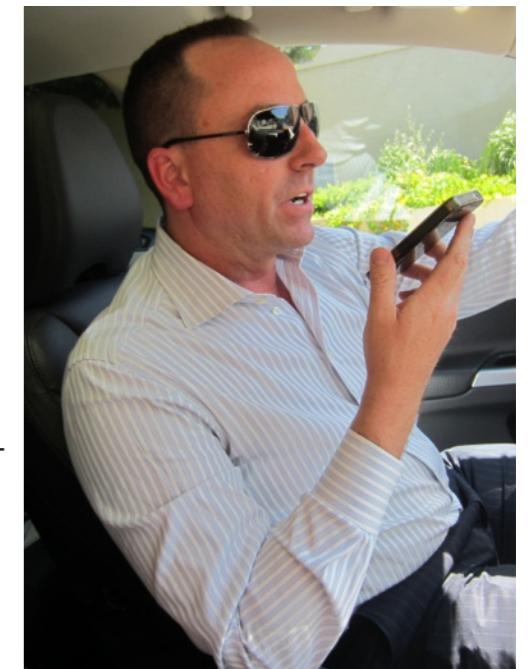Daniel snaps a couple of pictures of the board because he doesn't want to forget what they discussed.

12:30 pm The meeting ends and Daniel heads back to his car. Daniel has a break in his schedule between his morning client and his afternoon client. He grabs his phone and accesses his sales application that shows him which customers of his are close to where he will be. He notices that Fine Fashions, Inc., is near his afternoon appointment. They haven't purchased anything from Daniel in awhile and he thinks this would be a good time to re-engage them to see about upgrading their systems. He calls Marie Gillespie, the head of operations and asks if she is available for a last-minute lunch. She said she is and they agree to meet at 1:00.

12:40 pm While driving, he uses Siri to set a reminder for the next day to send price quotes for the two solutions to the client.

In addition, he also uses Siri to schedule a follow up meeting to discuss the quotes and the next steps.

1:00 pm Daniel meets Marie Gillespie in the restaurant lobby and they head to their table outside. Daniel is hoping that Marie's company is considering upgrading soon, and he can make plant a seed for a deal.

1:40 pm Daniel brings out his iPad to present to Marie his sales pitch about Internet servers. She is enthusiastic about it, and they agree to meet again once he has a quote for her.

2:15 pm Daniel puts the receipt in his wallet for later when he enters his expenses.

2:20 pm Daniel leaves the restaurant for a cafe to prepare for his 4 o'clock meeting. He gives his girlfriend a quick call to touch base about what they're doing this evening.

2:30 pm At the café, Daniel grabs a quick coffee.

While there he reviews the paper contract one more time that he will be getting signed at his next client visit. He is elated to know that everything looks correct. He has no way to make any changes on his phone or get a new one sent to him. Therefore, if there was a problem he would have had to go back to his office and reschedule the visit.

2:46 pm He uses his tablet to send an email back to a colleague at work asking if they can start on the price quotes for ACME Corporation. He attaches the picture of the whiteboard to help them understand the two options.

3:08 pm While he was sending the email he got an alert on his phone about a new lead coming in. He reviews the lead a bit more and creates a task to have a junior sales representative on his team investigate the lead further.

3:15 pm Daniel leaves the café and heads to his next client.

3:30 pm Daniel arrives at Allmax Inc. where he is going to get a huge deal signed. He calls Mr. Singh and lets him know he has arrived.

3:35 pm Mr. Singh meets him in the lobby and escorts him to a meeting room upstairs.

3:40 pm While in Mr. Singh's office they review the contract for installing Internet in three of the five buildings and for the price of Internet service for the next 6 months. Mr. Singh agrees with all the details listed and signs the contract for $275,000.

Mr. Singh also discusses that if he is happy with the service he receives he would be interested in replacing the current service they have in the other two buildings and possibly upgrading the speed in all five buildings. This is great news for Daniel.

According to Daniel:

"Even with all the technology, interacting with the customer is still the most important."

4:30 pm Daniel is very excited about the sale he just made and the potential for future sales with Allmax. He goes to his car and opens up his Evernote application and makes a note about the the speed of internet Mr. Singh potentially wants to upgrade to if he is happy with service.

He then opens his CRM application on the device to check out where he is on his quarterly sales. He sees that this sale will bring him way over his quota, and also sees the compensation impact, which is exciting to him.

4:37 pm He starts his car and heads home to finish documenting the details of what happened for the day. While driving he calls his boss and tells him the good news about his last visit. He also lets his boss know that he has exceeded his quarterly quota.

5:15 pm Daniel is back in his home office. He opens his laptop and logs into his CRM application. Daniel still prefers to document notes on his laptop because he finds it easier than entering the information using his iPad and iPhone keyboards.

According to Daniel:

"I really love that I can wrap up my day at home, instead of having to go back to the office."

He enters the following information for his client visits:

- Summary of the discussion

- Who he spoke with

- What they are interested in purchasing and what they purchased

- Any concerns the clients had

5:45 pm He also pulls up his company's social network to ask a question about a presentation he needs to make tomorrow to a pharmaceutical firm. He posts "Has anyone presented to small pharma companies? Any advice?"

5:49 pm A few minutes later, a coworker replies with a link to a deck she used with a product pitch tuned for pharmaceuticals. Daniel looks through it, and decides he can prepare for the meeting in the morning.

5:58 pm It has been a long day so Daniel then heads out to meet his girlfriend for a glass of wine and some dinner.

- Provide a way to integrate pictures and notes together into the Opportunity and Leads in mobile CRM application

- Provide a disconnected CRM tablet solution

- Include collaboration tools in the application for video-conferencing for team meetings and text messaging/Instant messaging colleagues

- GPS route planning with traffic information integrated

- Automated SMS/MMS/emails sent for client birthdays, anniversaries, etc.

- Integration of voice functionality into the application to reduce data entry

- Consider gamification concepts that provide monetary incentives for increased sales

- Incorporate a 360 degree view of client including information such as what happened in the past, is the client in good standing, competitor information, client information (birthday, anniversary, wife's name, likes, etc.), current install base, etc.

- Need ability to have access to key members in company including their expertise and availability when at a meeting (Engineer of Product X, Installation team, etc). This would allow Daniel to contact one of them on the fly while at a client visit

- Provide integration of contracts/policy agreements with signature capture functionality in tablet and smartphone solutions.

- Generation of customized sales presentation or product sheets to present to client while in the field (selecting fields that generate a template product presentation)