

reformXT

Case Study:

Palm® Mobilizes Sales Insight with ReForm™

For Palm, Inc., the mobile computing leader, mobile insight supports sales success. Palm employs 40 MarketSource® sales reps to train personnel at over 2,000 AT&T, Sprint, Verizon Wireless, and Alltel stores nationwide on Treo™ smartphones. For insight into their activity, Palm relies on the ReForm™ mobile data platform from Anyware.

Overview:

Brian Fitzgibbons, sales training manager at Palm, oversees the MarketSource reps. Each rep visits 80 to 100 stores a month introducing product updates, training personnel on product messaging and positioning, and supporting in-store sales. As part of the Palm team, the reps have specific objectives for each visit, and when Fitzgibbons needed up-to-the-minute performance data, he turned to Anyware Mobile Solutions – a Palm partner since 1997 – and its ReForm mobile data collection platform.

Gaining Insight:

At the end of every visit, each MarketSource rep asks the store manager or other staff to complete a customized ReForm survey running on a Treo smartphone. The store rep answers a set of yes/no questions and adds an open-ended comment as desired. When the rep is finished, the data uploads via the carrier's connection the centralized Anyware database. Fitzgibbons can log in anytime to his ReForm Online administrative interface for up-to-the-minute survey results.

Measuring Insight:

The survey is a “reality check,” Fitzgibbons says, providing valuable feedback to everyone with a stake in sales success, from the MarketSource reps to Palm executives. “I regularly download a report with about 1,000 responses. The quantitative results from yes/no questions reveal larger trends at a glance, and anecdotal data from the open question often provides insights into specific methodologies. The ReForm survey helps me address issues as they arise and match company goals with my goals and my team's goals.”

Fitzgibbons also sends results to MarketSource so they can assess performance. And twice a year he produces summary reports that enable Palm executives to correlate store visits with product sales and gain a clear view of sales training effectiveness.

Measuring Insight:

- Mobile sales survey goes anywhere reps go
- Provides instant insight into sales processes and personnel
- Delivers timely data for sales reps, sales managers, Palm executives
- Helps teams achieve sales goals

Measuring Insight:

- Mobile survey: Easy-to-use customized ReForm survey in a Palm smartphone
- Connectivity: Instant upload to Anyware database via carrier's connection
- Database: Centralized, hosted at a Tier 1 data center
- ReForm Online: Secure admin interface with survey design and data tools

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