

HOW TO CHOOSE

the

BEST MOBILE
SALES APP

FOR YOUR

TEAM



Your Mobile Sales App Success Depends on These Seven Answers

What This Short Guide Can Do For You

Have you ever felt like you were riding the perfect technology wave? Maybe you were the first marketer to use marketing automation, or the first kid on the block to get an iPhone. If that's you, then you'll know how we felt when we first saw the iPad and imagined its capability as a business tool. But the promise of these tools comes with some peril: how do you use them to your greatest advantage? This guide answers the crucial mobile app questions that could most impact your bottom line.

How FatStax Fits in the Picture

FatStax was started in 2010 as the result of two sales guys wishing for better tools to sell their products. We imagined using the iPad to easily find all the answers to all our customers' questions, right at the tip of our fingers. For the past 40 months we've tried to help folks just like you embrace the iPad as the sales tool that it's meant to be. Have there been bumps along the road? Dang straight. But each bump brought new understanding.

Why This Guide Is Different

What makes this guide unique is that it is purely a result of listening—on a daily basis—to people who like you are considering an iPad sales tool for their team. No matter whether they are marketers, IT folks, finance, or sales leaders—these are the questions we hear again and again.

After reading this guide you'll see a clear path to making the right decision about an iPad sales tool for your team. However, the reality is this: we don't have *all* the answers. Our stock answer is: *IT DEPENDS*. It depends on you and your company needs—one size doesn't fit all, but there is a size to fit.

How to Read This Guide

Not all of the questions will apply to your situation. That's okay! The questions are laid out in an easy-to-scan fashion so that you can get right to the heart of the matter, from wherever you are on your iPad sales-app buying journey.

We Are Here to Help

Of course there are thousands of other questions you might need answers to. If the answers aren't here, get in touch with us. We love mobility tools and the power of these applications to help sales people, and we LOVE to discuss what they can do for you.

Good luck to you as you lead your company to mobile success. We're here to help.

Thanks,
Rusty Bishop
Co-Founder and VP Sales
Red Funnel – Creators of FatStax

Table of Contents

1. What Is the Best iPad Sales App for My Sales Team?4

This section goes over the common features of iPad sales apps and provides suggestions on which might be best for your company.

2. Free iPad Sales Apps vs. Paid: Which is Best?.....7

Examining the differences between free and paid iPad sales apps, and which is better—and why—for enterprise sales.

3. How Much Does an iPad Sales App Cost? 10

The question your boss will be asking you.

4. Developing vs. Buying iPad Sales Apps: Which Is Better?.....13

The critical issues underlying the decision between developing a custom-coded iPad sales app or buying an off-the-shelf platform. Plus, a thorough cost-benefits analysis.

5. How Do You Manage Your Content on the iPad? 16

The best way to optimally input, manage and deploy your content to your sales team, considering both paid and free solutions.

6. iPad Sales App Tech Issues: How Can IT Help?.....19

The essential benefits of having sales, marketing and IT work together in the selection and deployment of the correct iPad sales app.

7. What are the Best Practices for Piloting iPad Sales Apps? 22

The value of piloting an iPad sales app before you implement it for your full sales team, problems that can occur without the trial runs, and how to avoid them.

What's the Best iPad Sales App for My Sales Team?

Choosing the right iPad sales apps for your sales team can seem like a daunting task. There are so many vendors and types of iPad sales apps, with differing features, and differing claims about those features. You might feel some pressure to get your app choice right, and right the first time, since these applications can make a big difference for sales success.

Unlike for mature business software platforms like CRM or e-commerce, the iPad sales app world is in its infancy. After all, the iPad itself has only been around for 3 years! It's no surprise that determining the precise app to suit your company's specifics might be a challenge.

To help you make informed and insightful decisions about the iPad sales app that will ensure the biggest benefit for your company, this section of the guide gives you a basic overview of the three main types of iPad sales apps and how they might work for your situation.

Common Features of the Best iPad Sales Apps

Almost all off-the-shelf iPad sales apps have the following features in common:

1. Offline access to collateral and product information. Your sales team has access to the right, complete information base, regardless of Internet access.
2. Ability to email collateral and product information. Your team can send the information they share with customers from their iPads.
3. Web-based Content Management System. Managers use this to sync collateral as well as update any information to be sent to their iPad sales apps in the field.

Keeping these common features in mind, it's important to base your decision on how your team sells. This is critical: choosing the wrong app could lead to months of confusion, and of course reflect on the bottom line. Consider these relevant questions:

- Do you sell thousands of products in a large catalog or are you focused on one large product?
- Is your sales team large or small?

To simplify, we have grouped the available off-the-shelf iPad sales apps into 3 categories, based on sales processes found in most companies today.



You might feel some pressure to get your app choice right, and right the first time since these applications can make a big difference for sales success.

Types of iPad Sales Apps

1. Transactional iPad Sales Apps

You might also think of these as “Order-Taking” iPad sales apps. These apps are designed for sales teams who take orders in the field from the same customers they visit regularly. A good example would be a Sysco Foods rep who regularly visits restaurants in the same cities, taking orders from chefs based on what they ordered previously or might need that week. Pricing is important. Easy integration with ERP or ordering systems is likely needed to be successful.

Advantages of Transactional iPad Sales Apps:

Most of the time, transactional iPad sales apps have pre-formatted templates that make it easy to update pricing and availability. The internal catalog structure is formatted like good old pricing sheets, making it easy on the reps. Customer information can be preloaded to facilitate easy invoicing and perhaps signatures.

Disadvantages of Transactional iPad Sales Apps:

These apps are mostly designed for transactions or invoicing, so they aren't a good fit for B2B sales reps that may need to search and show complex content such as a video, PDF, or a detailed piece of product information. Branding and other customizable features are often impractical due to the focus on invoicing or transactions. It may not be feasible to tie these to existing B2B systems like CRM or Marketing Automation. Examples: SuperRep, Handshake, or even Square.

2. Presentation iPad Sales Apps

These apps are like PowerPoint on steroids. They are truly exceptional for presenting layered product information about a single product or product lines. Many presentation iPad apps are set up for sequential selling, like a PowerPoint presentation, but the best ones can perform much like those old “Choose Your Adventure” books, where the rep can browse to the next video or image in a flowing sales situation. Presentation iPad apps can be great for companies that want to show beautiful images or present extremely detailed info on product lines like clothing or sports cars.

Advantages of Presentation iPad Sales Apps:

Presentation iPad sales apps can be deployed quickly due to narrow focus on an individual product or product line. You can create some unique ways to present products for your sales team that take advantage of the iPad's imaging features and “magazine-like” layouts. They can really show your unique brand.

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Disadvantages of Presentation iPad Sales Apps:

Sales teams that need to rapidly search through large volumes of PDFs and other collateral will find these ineffective. The focus is on flow, and presentation catalogs for sales reps that sell more than 500 products and need instant pricing or product details/specs will rapidly suffer. They require a lot of thought and planning to change due to their magazine-like layout. Examples: Prezi, StoryDesk, iPresent.



3. Enterprise iPad Sales Apps

You can largely consider enterprise iPad sales apps a combination of transactional apps and presentation apps. Enterprise iPad sales apps are designed to hold comprehensive product information such as large product catalogs and volumes of sales collateral (e.g., multiple PowerPoints and videos). The best ones come with APIs to interface with enterprise business systems such as Salesforce.com or SharePoint. Sometimes, like transactional apps, they contain pricing and deep product specs that can be served up to prospects.

Advantages of Enterprise iPad Sales Apps:

Enterprise iPad sales apps are designed to hold comprehensive product information such as large product catalogs, volumes of sales collateral (multiple PowerPoints and videos). The best ones come with APIs to interface with enterprise business systems such as Salesforce.com or SharePoint. Sometimes, they contain pricing and deep product specs that can be served up to prospects like transactional apps.

On the whole, enterprise iPad sales apps are easy to expand and brand with your corporate image.

Disadvantages of Enterprise iPad sales apps:

The initial cost and the time to deploy can be larger and longer than expected depending on the amount of information you need to include in the apps. Many companies expect the highly customizable features available only in apps that are coded by developers, and we'll cover that later in the guide. Examples: FatStax, Digital Sales Aid, and ShowPad.

What's the Best iPad Sales App for Me?

To summarize, the best iPad sales apps for your sales team are largely dependent on what your company is selling and what flexibility you need. Getting this right up front will save you budget, keep headaches away AND make you look like an iPad genius.

To summarize, the best iPad sales apps for your sales team are largely dependent on what your company is selling and what flexibility you need. Getting this right up front will save you budget, keep headaches away AND make you look like an iPad genius.



Free iPad Sales Apps vs. Paid: Which is Best?

In this section of the guide, we'll look at the differences between free iPad sales apps vs paid apps—and of course the focus will be on which is better for enterprise sales. And we'll consider whether something like iBooks is actually a sales tool.

Ask any marketing exec in a company that has deployed iPads and they'll tell you that staying on top of updating digital content in their iPad sales app is one of their most frustrating experiences. Constantly asking the sales team whether they've synced the latest collateral or having to field emails from the team about not having the right collateral is enough to make the sanest of people scream.

It's evident: a company must choose the right iPad sales apps to prevent content failure—input, delivery, display and updates—and avoid the sales consequences that lead to that screaming.

Budget concerns can often drive the decision you might make as a company deploying iPads: do I need to buy an iPad sales app or can I just use a free one like iBooks? It's important to compare the power and scope of the two types in the context of managing content for your sales teams.

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What Do Free iPad Sales Apps and Enterprise iPad Sales Apps Have in Common?

- Both apps employ a file structure for opening and displaying collateral.
- Content is made available to sync to the iPad from a content management system, which might be web-based or managed via iTunes.
- Once collateral is synced, both apps allow users to open collateral and share it with prospects.
- Both share the ability to email files to prospects directly from the app on the iPad, either by a download link or by direct attachment through the Mail app on the iPad.

What Makes Free iPad Sales Apps and Enterprise iPad Sales Apps Different?

- Paid iPad sales apps are designed to be selling tools with robust, customized features for salespeople, while free iPad sales apps are adapted from simple file-sharing tools designed for team collaboration.

- Although content management is performed somewhat similarly, with free iPad sales apps users have to individually select collateral to sync to the iPad. (Paid also supplies more content tools.) Conversely, with paid iPad sales apps, content is pushed to users' iPads; it's on the iPad whether salespeople choose to download or not.
- Enterprise iPad sales apps come with analytics for tracking, integration to existing systems like Salesforce.com, and branding to personalize the device's app. Free iPad sharing tools don't have these capabilities, nor some other significant ones.

So far, we can see that we have defined the differences between the two types of apps:

- a. Free with constraints, and with the team needing to act individually to sync content.*
- b. Paying for the assurance that the team is fully and dynamically updated and content is always at their fingertips.*

The choice seems to be between an app that can be adapted—with effort—to the purpose of selling, and an app that is designed with the express purpose of selling. All things being equal, the one that costs the least is a compelling choice, right? Well, not so fast—there can be quite a bit of *wrong* in free.

It's true, for many companies the adapted free iPad sales apps seems to be a reasonable choice. But, there are some significant reasons why best-in-class companies like Medtronic, John Hancock, Mercedes-Benz, and many more have ALL deployed paid enterprise iPad sales apps.

Why Have Leading Companies Chosen Enterprise iPad Sales Apps?

The answer largely comes down to consistency and flexibility with content management: a solid paid app ensures the team always has the most up-to-date (and branded) collateral at their fingertips when it's needed. Reps can quickly find pricing and critical details like specs and sizes in a paid app, access content offline or on, and content is always in its most updated form.

When a sales rep is on the front lines in a prospect's office with no access to the internet, there might be a decisive sales moment—that's a moment where a free app drops the ball, *and* the sale.

Do the math: one or two lost opportunities delivering an answer to a

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The decision of free iPad sales apps vs. paid often comes down to the discipline your sales team has in syncing collateral for offline access on the iPad, and your company's willingness to tolerate the consequences of lost opportunities at the point of sale.

prospect's questions because the right collateral is unavailable results in:

- Longer sales cycles (or the loss of the sale altogether)
- Opening the door for a competitor's reps
- Reps being frustrated and giving up on the iPad
- Another tedious search for a solution

Do we need to even ask if these issues concern you? Why would you take the chance? In our view, it's not a choice between free and paid. It's a choice between limited and effective.

Perhaps you won't need to spend all that money on a true enterprise iPad sales app if you can have your needs met for free. The decision of free iPad sales apps vs. paid often comes down to the discipline your sales team has in syncing collateral for offline access on the iPad, and your company's willingness to tolerate the consequences of lost opportunities at the point of sale. And how simple it is to make those situations easier.

Most companies who survey the power of reps responding in real-time to prospects with wholly updated collateral, a fully branded customized interface and a web-based content manager that makes updates easy from the office and in the field will gravitate to the paid model—and will see their investments met in no time. And see growing benefits for time to come.

How Much Does an iPad Sales App Cost?

I bet you flipped right to this page. Didn't you? It's the first question your boss is going to ask: How much does an iPad sales app cost?

IT DEPENDS. That's the best answer you can give. IT DEPENDS.

Think of your iPad sales app like a business suit. Do you buy one-size-fits-all suits or do you get fitted, and tailor the suit to your body? Are you a Bloomingdale's lady or is JCPenney's your speed?

You could buy a cheap suit and get away with wearing it to some business meetings. But, if you're meeting with Fortune 500 companies in fancy boardrooms, people are going to notice you are wearing a cheap suit. In that situation, there's a high cost to wearing a cheap suit.

So, when it comes to your iPad sales app, consider what you're willing to bet on your corporate image. Your sales rep is going to be rocking this "suit" every day of their sales lives.

Every time they meet with a customer

Every time they go to a trade show

Every time they go to the boardrooms of your customers

We often see companies more focused on the one-size-fits-all, low-cost options like Dropbox or iBooks for an iPad sales app. Often, the lack of investment results in "suits" that never leave the sales rep's suitcase. In other words, no sale.

To avoid this dilemma, let's look at some key variables that affect the cost of every iPad sales app:

- The number of users (is it 2 or 200?).
- The complexity of the materials, files or collateral going into the app. (Test documents or complex HTML5?)
- The image the app portrays. (Does the iPad app need to have your branding and corporate image or you prefer something off the shelf?)
- Integration requirements like Salesforce.com and Oracle ERP—each used by sales reps out in the field. (If you want to integrate those with your iPad app, that comes with a price tag.)



So, when it comes to your iPad sales app, consider what you're willing to bet on your corporate image. Your sales rep is going to be rocking this "suit" every day of their sales lives.

So, understand what your team needs. Then, determine the best sales app to match those needs. Then we can tell you how much an iPad sales app costs.

- Apple iOS upgrades. Anyone who's had an iPhone, iPad or any Apple product knows Apple's constantly upgrading its operating systems. And iPad apps, of course, must also be upgraded when those OS systems are upgraded.
- Feature upgrades and additions. Inevitably, the team is going to ask for new and different features. Those features (and what it takes to code them) will drive up the cost.

Understand what your team needs, then determine the best sales app to match those needs. Then we can tell you how much an iPad sales app costs.

I know, we still haven't answered your question. Here at Red Funnel, we designed four packages to meet a company's baseline needs (and fill in any holes with add-ons), so every app we deliver is custom-fit. Think Armani.

We'll outline the packages here to give you some idea of how one size does *not* fit all.

1.) Starter – Designed for companies just getting started. If you want to try out an iPad sales app, it's licensed for five users. Basically, it's limited to ~500 pieces of collateral—perfect for a company with a small internal sales team or a marketing department that will use it at trade shows. Pricing ranges from \$1,500 to \$5,000 per year, depending on need.

2.) Basic – Includes all the features for all our iPad apps, including service and support for the app and content management systems. Basic comes with everything needed for 50–100 users, and pricing ranges from \$15,000 to \$25,000 per year, depending on the add-ons and bells and whistles.

3.) Professional – Designed for larger companies ranging from 100–300 sales reps in the field. It includes additional apps, catalogs and multi-language support. It's more of a turn-key type of solution. Prices range from \$25,000 to \$45,000, depending on the add-ons and integrations.

4.) Enterprise – Designed for Fortune 500-size companies. It is equipped for multiple business units: large, scalable, and flexible apps. Everything is private and secure to meet corporate standards. Pricing ranges from \$45,000 to \$90,000 per year depending on the size and amount of apps needed on the platform. The majority cost about \$45,000 per year. We've helped companies deploy the Enterprise package with 64 apps running off of one back-end.



So, it depends ...

When it comes to finding the right iPad sales app for your sales team, keep in mind these types of solutions are not like the Starbucks app you download to find that favorite coffee joint. They are much more like a nice, custom-tailored suit. Precisely designed for the size and style of your company.

So, how much does an iPad sales app cost?

The answer is, it depends on which “suit” is best for your sales team. It’s not a question we take lightly, and we hope you won’t either.



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Developing vs. Buying iPad Sales Apps: Which is Better?

On the surface, looking into developing iPad sales apps for your company can seem like a shrewd decision. After all, wouldn't it be totally customized to your specific needs? But there's much to look at under the surface. First, let's consider where to get started, and how you might hire developers.

Many companies might not even know basic considerations, such as not knowing that they can buy an iPad sales app platform off-the-shelf. And that there's a considerable difference between developing and buying iPad sales apps.

Perhaps you're thinking: my cousin's best friend's uncle's sister developed an app, pushed it out to the app store, and made a million dollars. She wasn't a full-time developer and did it in her spare time. If she can do it, our IT department can too. It's an appealing thought, but that line of thinking has to be scrutinized for its validity for you.

"How do I develop a customized iPad sales app?" is a question we hear often. For some organizations, developing their own iPad sales apps can be effective. But for others, the costs, complexities and roadblocks will make them wish they chose the more convenient—and often shockingly simpler—option. Effort and results are vital. The key to success is in understanding the differences between developing an iPad sales app vs. buying an iPad sales platform. So let's compare and contrast the two.

Developing an iPad Sales App

Let's start with a clarification. Using Dropbox or iBooks is NOT developing an app. Building an app means you are hiring developers to write software code to produce a functional iPad sales app used by your sales team.

Consider how we broke down the most common features of iPad sales apps in the first part of the guide. Keep those tools in mind when you consider developing your own app.

By developing an iPad sales app, you are of necessity hiring coders (unless by unusual circumstance, you have iPad app coders on staff). Some of the advantages of hiring software developers are:

The key to success is in understanding the differences between developing an iPad sales app vs. buying an iPad sales platform.

- **You have complete control over the features and functionality.** Sounds good, right?
- **Your sales app will be uniquely matched to your sales process.** No other companies will have an iPad sales app quite like yours. The features and user interface are uniquely yours too. Customizations? The sky is the limit.
- **You can add features and launch them when complete.** With developers, you create new features and deploy them to your app without Apple's approval or submitting them to the App Store.

But be cautious—developing your own iPad sales app has a share of drawbacks, too.

Disadvantages of Developing Your Own iPad Sales App

- **Direct Costs** – Ballpark costs on developing your own iPad sales app are anywhere between \$25,000–\$300,000, depending on features needed and integrations required for your sales process. Any developer worth their chops will cost \$100,000–\$200,000 to hire full-time. Expect to pay \$150–\$450/hr for enterprise-class talent at a development shop.
- **Support Costs** – This includes the recruiting process and code support costs. Ongoing maintenance of the code includes accommodating iOS updates (keep in mind, Apple's pushing multiple ones per year). Don't forget the cost to develop new user features to keep you on the cutting edge.
- **Time to launch** – Three companies told us it took about nine months to design, develop, test, and launch their iPad sales apps. Add another three to six months to get it right while your team adapts it to the field. Ouch.
- **Bug fixes** – These are inevitable. Expect bugs in any software—large and small. Remember that tiny bug in a game you loved to play that reared its ugly head after Apple released a new iOS update? Your game no longer works and the software on your iPhone or iPad was also affected. Since you are responsible for the code now, you have to pay to fix it. And of course, it's hard to look at company revenue as a game.

Maybe developing an iPad sales app is for you, and maybe it's not. Let's look at the advantages of paid iPad sales apps.

Buying iPad Sales Apps

As before, let's clarify: Paid iPad sales apps are pre-built, off-the-shelf platforms ready for your files and information. Many have customization features that offer great flexibility to a company.

Maybe developing an iPad sales app is for you, maybe it's not. Let's look at the advantages of paid iPad sales apps.





The paid app is often the most sound sales decision a company can make.

Almost all iPads sales apps are sold as Software-as-a-Service, or SaaS. Think of it as though you are leasing software.

Advantages of Buying an iPad Sales Platform Off-the-Shelf

- Overall cost – In comparison to developing your own app, it will cost ~\$5,000–\$90,000 annually to deploy an off-the-shelf iPad sales app depending on the size of your sales team and the features you need. SaaS companies like us or Salesforce.com are responsible for updating the features and iOS compatibility for all customers, which distributes and reduces the cost of monthly/annual fees.
- Speed to launch – Many off-the-shelf iPad sales apps are launched in a month or less. Deploying the app to the field is the only way you'll know it works (and the support staff will be with you in your deployment).
- Bug fixes – Paid iPad sales app and software developer service companies are forced to fix bugs quickly to keep clients smiling.
- Customizable – You have options to quickly customize apps to your brand and your sales process.
- The best ideas may come from other industries and other sales teams – With thousands of users across various industries, iPad sales app companies integrate customer feedback into features that you never knew you needed—and they are a godsend when you do.
- Quit when you like – Most iPad sales platforms offer monthly payments or yearly payments with no long-term obligation. This means you can try them for a few months and learn a lot about how successful the project will be for your sales team.

Decision Time: Which is Best for You?

A larger corporation can absorb the costs, seek developer talent, and spend the time to deploy an iPad sales app. But if you are looking to launch quickly and at a fraction of the cost, buying an iPad sales app may be the way to go—even if your cousin's best friend's uncle's sister did develop her own app.

Sales reps, their managers and their manager's managers are delighted with the deep control over content delivery. They can update the richest representations of their products, and the easy lead management available through quality paid apps. The paid app is often the most sound sales decision a company can make.

How Do You Manage Your Content on the iPad?

Let's look at the two most common ways to manage POS collateral for business iPads. (Of course, before we even get into it, we're in agreement that strong collateral management—and its consequence, strong presentation—can be a significant influence on your sales success.)

First, a tale of woe: A large multinational company rolled out iPads to 2,000+ sales and marketing people around the world in the summer of 2010. When I met their Director of Marketing at a trade show in Portland in November of 2010, she showed me how they were using iBooks to present and share collateral on their iPads. It all seemed so amazing then to have what seemed to be an extraordinary capability for mobile selling.

A year later we met at the same trade show and I asked her how the iPads were being used. She expressed lots of frustration and told me that, for her team, things were not going well. In fact, based on a questionnaire at her regional sales meeting, less than 20% percent of her sales team were using their iPads during sales calls. Why?

After the first few months of use, the team began to find that they didn't have the most up-to-date brochures and presentations. She was sending regular updates to the team-via email, but it turned out team members often forgot to plug their iPads into iTunes to load the brochures into iBooks.

That resulted in situations where the right—newly updated, most accurate—sales collateral was unavailable on their iPads when they were in front of prospects. Salespeople don't like to look dumb in front of customers (and to feel dumb themselves about their presentations), so most of them defaulted back to carrying printed brochures and left the iPads at home.

This leads to one of our maxims for a successful iPad business application: ***Make it very easy to update POS collateral to the newest version for every team member. Every update, every time.***

Successful iPad deployments accomplish this with web-based content management systems or “backends” that provide a single point of access to update POS collateral. The process seamlessly pushes files, manuals, videos, or product information to the iPads without need of user intervention.



Salespeople don't like to look dumb in front of customers (and to feel dumb themselves about their presentations), so most of them defaulted back to carrying printed brochures and left the iPads at home.

For smaller companies, you may get by perfectly fine with desktop content management (you email collateral to the team, they install on their iPad), but for larger companies, this process will quickly break down, leading to sales team frustration.

For smaller companies, you may get by perfectly fine with desktop content management (you email collateral to the team, they install on their iPad), but for larger companies, this process will quickly break down, leading to sales team frustration. Some people might have the updates, some not. Some might have familiarity with the newest information, some won't.

So let's compare and contrast this desktop (user-controlled) updating with transparent web-based management, so you can determine which is right for your team's mobile initiative.

Simple Desktop Content Management for Basic iPad Apps

You can use these apps on individual computers to transfer POS collateral to the iPad app. Just plug in your iPad, turn on iTunes, and drag collateral to your iPad app. Apps include iBooks, GoodReader, and Dropbox.

Advantages of Desktop Content Management Systems for iPad POS Collateral:

- Low cost – These are basic content apps that let you see and access files. They are mostly free or < \$15.00.
- Small teams and individuals can update them quickly – For individual reps, it's pretty easy to update a few PDFs and presentations on their iPads.
- Simple to use – It's pretty straightforward to open an email and open a PDF in iBooks, then save it to view later.

Disadvantages of Desktop Content Management Systems for iPad POS Collateral

- Users have to update themselves – Users have to sync and/or select collateral to sync to iPads. But, the reality is, salespeople sometimes don't plan ahead. So, if you're constantly updating Dropbox or sending brochures via email and requesting that they be added to the iPads—you can forget it. What are the chances of the sales reps doing this regularly and with the needed consistency? Hovering near zero.
- No visibility – These systems usually don't come with analytics, which are critical to determine the status of your team's activity in syncing and using collateral on the iPad.
- iTunes syncing is manual – You have to open collateral in email, drag it over to the desktop, plug the iPad into the computer, and download it to the iPad in the correct location. What are the odds of your full sales team doing this accurately, every time? What's your best guess?



Web-based Content Management Systems for iPad POS Collateral

These systems enable you to have a single cloud-based location for all the sales and marketing collateral. The administrator logs into a web-site and then adds collateral or product information. This content gets pushed down to all iPad sales apps in your system at once.

The Advantages of Web-based Management Systems for iPad POS Collateral:

- Single point of management – You could use your iPhone to update your newest, hottest brochure, and the update will be pushed down to all your teams' iPads.
- No need to rely on users to manually sync collateral – Many apps download new files automatically. There is no manual intervention required.
- Send notifications to users when collateral is added – Let them know it's arrived on their iPads; they are in the loop.
- Analytics allows you to see how your team is using and syncing collateral – You can easily log in to a single point of access. Not only can you manage activity with your iPads, but you can also see how the iPads are used to sync/view collateral and track customer information.

The Disadvantages of Cloud-based Management Systems for iPad POS Collateral:

- Initial cost to install and launch – You get more features and thus pay for more features. They usually run \$25–\$40 a user/per month.
- More complex for administrators – In order to make it simpler for users, sometimes you shift some tasks to administrators, such as keyword tagging and updating the content manager.
- Another system to manage – Even with many of these CMS options offering integration with existing systems like Sharepoint or Salesforce.com, the practical matter is it still involves some management time.

Look at the price of the system, your budget, and the size of your sales team before deciding which content management is best for your iPad business initiative. If you have one to three sales reps, maybe go with a free desktop-managed application. If you have 10-plus, consider a web-based content management system for better visibility of the team and access to its updates.

Free applications have their selling points, but when you are dealing with high-volume sales, large teams, deep product information—or simply need to see the most gain for the least time and hassle, web-based systems speak for themselves. Often loudly.



In summary, look at the price of the system, your budget, and the size of your sales team before deciding which content management is best for your iPad business initiative.



iPad Sales App Tech Issues: How Can IT Help?

If you're considering deploying an iPad sales application for your sales team, you've probably begun discussions with your IT department to help you get the job done—and done effectively, for all concerned. Over the past three years, we've heard from both marketers and IT folks about the complex challenges each face in working together to resolve (and avoid) serious iPad sales app issues and problems.

It's critical that marketing and sales people looking to deploy an iPad sales app learn how to work with IT—which can be intimidating in concept.

In fact, “How closely do we need to work with IT to deploy iPads?” ranks in the top five questions we hear from marketing and sales people. While it's true the IT department's implementation concerns can cause delays with iPad sales app launches, their expertise may supply the best solution to common issues.

It's critical that marketing and sales people looking to deploy an iPad sales app learn how to work with IT—which can be intimidating in concept. This guide section considers why you need IT support to deploy the best possible iPad sales app for your team and what problems and issues need to be addressed before you start.

And, if you're in IT—don't stop reading. You'll find three areas where you can provide a major impact on your company's sales results.

Problem #1: Choosing a bad iPad Sales App Vendor

Most iPad sales app projects we deal with are owned by Sales or Marketing. The problem is this: Sales and Marketing people don't deal with software vendors on a daily basis. Coding languages and hardware integrations are not part of their daily jobs. Agile development and SQL databases are not in their vocabulary.

IT people know exactly how to ask the right questions about software and technical matters from software vendors. They deal with vendors all the time, so when a vendor is full of crap or when something is not quite right, they can catch it or head it off before there are sour consequences. Furthermore, IT often is working with different business units or divisions. There may be global IT initiatives or other divisions that have a mobile solution to your business issues already in development, so your search is solved before it's started.

Finally, larger enterprises often have approved mobile vendors for iPad software, and you could spend months working with a vendor only to find you can't finish the project with them. Talk about a waste!

Problem: *Choosing the wrong software vendor can slow or derail an iPad app launch.*

Solution: *Ask IT to join you early in the vendor selection process.*

Problem #2: Incompatibility with Existing Systems

We recently encountered this problem with a multi-national corporation that didn't plan ahead on integrating their iPad sales app with their existing business systems, resulting in an expensive "do over." First, they added a file-sharing tool, Box, then followed with an off-the-shelf iPad sales app. Then the sales team started asking for the ability to log customer information to Salesforce.com. Although we appreciate the business that resulted from their fiasco, we hope you won't have to go through that.

Question: Who knows all your company's existing software systems? If you guessed IT, you guessed correctly.

IT can be a huge help when integrating your iPad sales app to enterprise systems like Salesforce.com, SharePoint, and ERP—all of which your sales team, as well as Sales Managers and VP types will eventually be asking for.

Your IT people also have a good handle on what an API is and why your iPad sales app platform of choice may need one. Hint – APIs help you integrate systems.

Problem: *Incompatibility with existing systems can cause costly iPad app upgrades.*

Solution: *Get your vendor/s of choice talking with IT early in the vetting process.*

Problem #3: Gathering and Syncing All Your Sales Collateral

Questions about "who owns the data?" can really slow down an iPad sales app launch. If you are like most marketers, your key sales collateral includes product and pricing information, PDF brochures, PowerPoint presentations, and videos, which are stored in multiple systems and areas within your organization.

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In one case, a customer spent over a month just trying to find the person with access to their e-commerce website, to gather their product information to build their sales app! It turned out a consultant from Deloitte was the only point of access.

IT can vastly simplify the process. In most cases, they know the stakeholders for each of your key information and file-storage systems. Such systems and storage sites might include:

- File sharing systems – SharePoint, Box
- E-commerce websites – Magento, etc.
- Desktop and laptop computers of Product Managers
- Email folders

Each system has its own passwords and stakeholders. IT is your best bet to find them and to help you extract the files in a usable way. If you are planning a bulk upload of product collateral from your e-commerce site, help from IT is probably the only way you will get the files quickly.

Problem: *It can take a lot of time to gather sales collateral from various systems for your iPad app.*

Solution: *Create a list of collateral sub-types and talk with IT to determine the stakeholders early in the process.*

Bonus Problem and Solution: Security Issues with iPads

IT can be total pain when it comes to enterprise security, but they can absolutely save your tail when auditors come knocking. Even though it's tempting to bypass IT, for larger companies we don't recommend it. Period.

Seeing the big picture, the most effective iPad sales app launches will include a mix of IT and marketing. Learning what each team specializes in will make the project go as smoothly as possible. You'll have the added bonus of your teams working together for the common good—and the whole company will reap the benefits of that into the future.

What Are the Best Practices for Piloting iPad Sales Apps?

Many companies wisely decide to pilot their iPad sales app prior to launching to their sales team at large. Giving the app trial runs in simulated sales scenarios are the best way to see if you've configured your data to its optimum display, and to familiarize your test team with all of its tools and features.

The pilot period gives you an observable way to determine how the sales team will use the iPad sales app and what collateral is missing or is most successfully deployed. It's also a great time to observe key user interface problems, like features that aren't understandable at first glance or concepts that aren't a fit for your team.

We unequivocally recommend piloting your iPad sales app before launching to teams of more than 50 sales and marketing people. If any app developer or salesperson doesn't suggest that—run. Seriously, they are the wrong shop and don't know what they are talking about.

Furthermore, the temptation to look for immediate home runs like actual sales during the pilot period is large, but can often derail the project. What you want to do is to get smooth grounding in all of an app's potential before you take to the air.

We get the urge to deploy and conquer. Your company has invested a lot of money, effort, and time to get the iPad integrated, and you want to make a splash. But to be successful over the long term, you need to get this right before making the kind of splash that drains the pool!

Here is one simple concept that will make an iPad sales app pilot program a smashing success.

Avoid Failure Points

What the heck is a failure point, you ask?

Have you ever eaten a really great dessert like a soufflé and then tried to make it at home? No offense to your cooking skills, but I bet it was terrible. Mine was a complete disaster—incredible. The reason: too many failure points. Egg fluff, cooking temperature, wrong pans: you name it, there are too many ways to screw up a soufflé, particularly for the inexperienced. Each one is a failure point.



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The goal of an iPad Pilot Project is to systematically overcome failure points by not allowing them to gum up the pilot. In these trial runs, you want to stay lean and focused.

An iPad pilot project is the same way: lots of variables that lead to failure points. Here are the few that matter most to your pilot:

- Too much information – This leads to too much data gathering and preparation time prior to launch. Simplify to the most important collateral first.
- Intimidating features – Overwhelming a team with every single feature, introduced too early, leads to reps not using the app at all.
- Too many integrations – We love Salesforce.com and Marketo, but integrations require manpower and can be complex and expensive.
- The “Legal Swamp” – Your legal team should get involved mid-pilot to review the Software License Agreement. You’ve then opened a narrow window for them to get their job done and not be a roadblock.
- Too many expectations for different user groups – One goal for the pilot is, “Do they use this?” Not, “Can we capture leads and measure usage of collateral and tweak our messaging?”
- Updating ANYTHING during the pilot – Tinkering, tending, watching, tweaking ... do these after the pilot, when the users can tell you everything that really needs to be addressed at one single time.

The goal of an iPad pilot project is to systematically overcome failure points by not allowing them to gum up the pilot. In these trial runs, you want to stay lean and focused. Extensive feature testing and loads of content will come later, but have no place in a proper pilot program.



What's Ahead for FatStax

We hope the information in this guide was helpful in giving you a deeper understanding of the power of a refined iPad sales application, and how its suitable use can be a transformative tool for your sales department and your entire company.

We will be continuing to develop and refine our products for the mobile space, and are likely to produce similar guides that explore developing technology and the strongest means to implement it.

We invite you to visit our website at www.fatstax.com to review additional information about FatStax and our other products. Please don't hesitate to send us an email or give us a call to discuss your company workings and how our technology might be a part of your success. We're always up for that conversation.

Thanks, Red Funnel Consulting

www.fatstax.com
info@fatstax.com
800-734-7750

