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Out-of-the-Box Thinking for SharePoint Mobility

Part 2: Field Sales

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Mobile Access is Not Easy with SharePoint

Today, mobility means not just the type of device you are using, but the way you are working.

In this four-part series of mobile worker scenarios, our goal is to help you understand what you can achieve out of the box with OneDrive for Business, SharePoint and Office 365, and where you may need third-party solutions to create secure, yet user-friendly access to mobile and offline content.

When we look at the mobile experience in SharePoint, OneDrive for Business and Office 365, the out-of-the-box scenarios don't necessarily give mobile workers the richest and most user-friendly experience possible. Getting to a document library to open, edit and save a document in a browser on a device can be a difficult task. It's even tougher when you try to work offline as many of the mobile access points in SharePoint assume you are connected to your environment.

"Mobility is about professionals who work remotely, who need access to content in distant, sometimes poorly or disconnected locations, and who collaborate with other parties, not just within their organization, but outside their organization as well."

Dan Holme
Office 365 MVP

A 2015 AIIM study highlights the mobile experience in SharePoint, OneDrive for Business and Office 365:

35% of respondents reported frustrations with the lack of mobile support in SharePoint and the difficulties of getting external access.

20% are concerned that the frustration with the SharePoint user experience is leading employees to look for easier to use, non-sanctioned services.

To solve this, 12% of the companies surveyed already use a third party tool to gain a better mobile experience for SharePoint, and a further 32% have firm plans to implement a third party solution for their mobile workforce within 12-18 months.

The Field Sales Executive Needs to Effectively Engage with Customers

Sales executives drive corporate revenues and the sales department is usually one of the first to be equipped with mobile access.

It's important for field sales executive to have a process for immediate access to customer and product information.

At their fingertips, they should have all of the material needed to engage with their customers and submit order forms:

- Their **contact list** to be able to contact customers on the road and to look up their account details.

- **Business intelligence** about their customers to have an intelligent conversation with them. Access to account details is essential.

- **Sales collateral and presentations** to share different documents, depending on the direction in which the customer meeting or call is going.

- **Up-to-date inventory** information about products and access to price lists is essential to handle customer requests in a timely manner.

- **Order forms** to fill out orders on the road and complete the sale whilst with the customer.

- **Offline access** to ensure that field sales executives can have access to their material at all times, even without an Internet connection. They may be in the basement of an office building with poor reception, or out at a work site with no reception at all. Their access to the above critical information cannot be contingent on being online.

> *"It's important that there's a systematic approach to helping sales representatives prepare for those in-person interactions, making sure that they've got access to the information about their customers, so they can effectively engage with those customers, and that they've got the information about the products and services they're selling, so they can present those to customers."*
>
> **Dan Holme**
> Office 365 MVP

Mobile worker requirements:

A single source of truth on multiple devices
The ability to access the same content on multiple devices with content looking uniform across desktops and devices.

A simple user experience
Intuitive and easy to access and work with the content on any device – online and offline.

A platform that can be controlled
A set of applications that are sanctioned enterprise-wide, where all content can be managed centrally.

Governance
A secure system that allows the enterprise to govern the content and the devices from which that content is accessed.

Out-of-the-Box Solutions

We're going to look at how Office 365 and SharePoint can support access to these 3 content types for field sales executives:

Contact Lists

Business Intelligence and Collateral

Inventories and Orders

Contact Lists

In Office 365, there are two common options for storing contacts: a SharePoint contacts list or an Outlook contacts folder.

You can add a contacts list to any SharePoint site. A SharePoint contacts list can be accessed from the SharePoint site itself, using a web browser. Or, a sales executive can connect the SharePoint contacts list to Outlook, and interact with the list directly in Outlook, online or offline.

Working with contacts in Outlook, sales executives can:

- search for contacts by name, company, title, etc.
- click a contact's email address to send a message
- initiate a mobile or Skype for Business call with a contact
- export contacts

Alternately, contacts can be stored in an Outlook contacts folder in the executive's Office 365 mailbox, hosted by Exchange Online, in a public folder, or in a shared mailbox. Public folders and shared mailboxes provide a centralized store of contacts that can be shared across users. When a sales executive requires a list of personal contacts, those should be stored in his or her personal mailbox.

In any of these three configurations of an Outlook contacts folder in Office 365, sales executives will use Outlook or Outlook Web Access to manage their contacts. For offline access on a PC or Mac, Outlook will be the tool of choice, as Outlook Web Access requires connectivity to Office 365.

SharePoint contacts lists cannot be accessed using Outlook Web Access.

Contacts stored in Exchange Online can often be incorporated directly into the contacts app of the sales executive's mobile device. This is particularly straightforward for contacts stored in the user's personal mailbox. Support for direct integration of shared mailbox and public folder contacts varies based on the device and the app.

It would seem that storing contacts in Exchange Online, and accessing them using Outlook or mobile device apps is a "no brainer" choice. Why would one choose to store contacts in a SharePoint list?

Contact Lists

SharePoint lists are easy for users to add to a team site. It is more difficult to configure shared contacts in public folders or shared mailboxes. Configuration of shared resources in Exchange often requires IT intervention.

SharePoint lists also provide customization that Outlook cannot as easily support. A user can add custom columns that can include metadata and lookups against other SharePoint lists. However, while those customizations will be visible in the SharePoint list, those customizations will not be synchronized to or accessible from Outlook.

While this white paper focuses on Office 365, there are, of course, other options for contact and customer relationship management in the Microsoft cloud—specifically, Dynamics CRM—and with other third-party services.

Business Intelligence and Collateral

Business Intelligence

The easiest way to go about collecting and managing business intelligence for the sales team in SharePoint and Office 365 is to use Excel Online. Inside Excel, sales executives can create and use charts and graphs to build a variety of dashboards and visual presentations of sales progress.

The only skill needed to use Excel Online is to connect to a data source from Excel, which in itself is intuitive. So it's easy to train new salespeople on the software - and with ease of use comes user adoption. Once connected to the data source, salespeople can use Excel to build charts and graphs that connect to the data they're retaining in their Excel document.

Technically, there is not a lot of custom code needed to implement this Business Intelligence (BI) solution.

Dashboards built within Excel workbooks can be stored in a document library of a team site, and made available offline with OneDrive for Business.

Business intelligence dashboards can also be built using a SharePoint page, with Excel web parts. More sophisticated organizations may use PowerBI and analytics within Dynamics to support BI requirements. Unfortunately, there is no out-of-box solution for providing offline access to BI dashboards created using these approaches.

Sales Collateral and Presentations

Sales collateral and presentations can be stored, like any other file, in SharePoint document libraries, OneDrive for Business, or in Office 365 Groups.

Document libraries in a SharePoint Team Site provide the richest support for metadata, workflows, and document approval. Users can access a document library using a web browser, which requires online connectivity to the document library.

Business Intelligence and Collateral

For offline access on a PC, users can synchronize a SharePoint document library to the local disk using the legacy OneDrive for Business client application. Mac OS X users can use Microsoft Document Connection. Microsoft will be adding the ability to synchronize SharePoint document libraries to the new One Drive for Business sync client in 2016.

There is no out-of-box application for synchronizing SharePoint document libraries to mobile devices.

Office 365 Groups provide a file sharing capability with a modern and responsive user experience in a web browser. Behind the scenes, each group includes a SharePoint document library as the file store, so Office 365 Groups files are synced in exactly the same ways—and with exactly the same limitations—as SharePoint document libraries.

The best experience for offline access is currently the user's personal OneDrive for Business. Although a user's OneDrive for Business is not designed to be heavily utilized as a shared resource, it can be shared. Files in a user's OneDrive for Business store can be synched to a PC, Mac OS X, iOS or Android device using the OneDrive for Business clients or apps.

Each of these have undergone significant revision in the last weeks of 2015, resolving limitations and performance issues that plagued the legacy OneDrive for Business client.

There are no out-of-box methods to "push" files to a user's offline cache. Users must manually select libraries and folders to take offline.

Sales executives on the road can view, edit, and present using Office Online, when connectivity to Office 365 is available, or using Office client or mobile applications.

Giving a presentation to a customer in a face-to-face, offsite meeting has become significantly easier over the years. A sales executive with a mobile device that includes the Office mobile apps and OneDrive for Business can be fully ready to present and to share information with no connection to the Internet.

Inventories and Orders

Let's face it, large blue-chip companies with thousands of products will probably use a system other than SharePoint to track their inventory. However, smaller companies do frequently build CRM systems and inventory management inside SharePoint. They even create order submission and processing applications using SharePoint.

The most important thing to remember is that any system based on a SharePoint list will not be available in disconnected, offline scenarios. This could be a real deal-breaker for field sales executives. If they don't have access to inventory information, the ability to check prices or to submit orders, they cannot get their job done.

Even in connected scenarios, SharePoint lists don't provide adequate support for mobile forms or for a responsive, modern user interface.

Organizations that want a simple and highly productive approach to supporting offline access to lists turn to third party solutions for a cost-effective solution. The alternative is to hire developer resources to build a custom solution.

"One nice thing you do get out of the SharePoint list is the ability to edit that list, and you get the forms to put in new items and edit those items and update them or put workflows around them. That is one nice aspect of what you can do with SharePoint lists, but, as we mentioned, the mobile interfaces with SharePoint lists are limited to the contemporary mobile view that SharePoint gives you out-of-the-box."

Todd Baginski
SharePoint MVP

Mobile Requirements Checklist

Taking a broader view of the requirements we've introduced in the field sales executive scenario, here is a checklist to use as a shortcut to evaluating and prioritizing your mobility needs.

Mobile Requirements Checklist

Mobility
- ○ When needed
- ○ Across devices
- ○ Where needed
- ○ Low speed/latency
- ○ Offline
- ○ Secure

User experience
- ○ Easy: "discoverable"
- ○ Integrated: "native"

Content requirements
- ○ Documents
- ○ Contacts
- ○ Calendars
- ○ Tasks
- ○ Lists
- ○ Forms
- ○ Media
- ○ Business data
- ○ Business intelligence
- ○ Conversations

Enterprise content
- ○ Information architecture
- ○ Findability

Adoption & usage
- ○ Measurable

Governance
- ○ Access control
- ○ Rights management
- ○ Records management
- ○ Auditing
- ○ Reporting
- ○ E-Discovery
- ○ Supportability

Mobility
First, you need to think about mobility itself. Where and when is the content needed? Is it needed across multiple devices? In what kinds of locations do employees need to reach their content? Do these locations have low speed or latency problems? Do you need offline access to the content? What requirements do you have for mobile security?

User experience
How easy, or discoverable, does the experience need to be for your users? How native does it need to feel?

Content
What do users need to have access to? Take into consideration documents, other content, calendars, tasks, lists, forms, media, business data, business intelligence that makes sense of that data, and conversations with peers and customers. Is there a need for information architecture? What are the taxonomy requirements, and how are you going to make that content findable?

Adoption
How are you going to drive adoption of the solution? How are you going to measure it? How are you going to know that people are using the solution you've built and not bypassing IT in favour of rogue solutions on unsanctioned platforms?

Governance
How are you going to govern the solution as a whole? How are you going to manage access and permissions? Do you need to apply information rights management? Do you need to preserve content as records? What kind of auditing, reporting and insight do you need? If you ever get a legal action that surrounds this particular use case, are you going to need to support it with e-discovery?

Support
If you're going to deploy a mobile solution, what happens if something goes wrong? What level of support do you need from Office 365 or a third-party vendor?

Configure, Build or Buy?

The best way to evaluate your needs for enterprise mobility is to consider the requirements in the context of each group of content and examine them across your requirements – do you need to configure the platform, build your own extension or buy a third-party solution? For example, if you need offline access to documents, can you configure your current solution, will you need to build an extension to achieve caching of documents or should you buy a third-party solution?

The below mobile requirements matrix is a starting point for you to evaluate your organization's requirements.

Content types	Mobility						User Experience		Enterprise Content		Adoption & Usage	Information Governance					
	When needed	Across devices	Where needed	Low speed/latency	Offline	Secure	Easy: "discoverable"	Integrated: "native"	Information architecture	Findability	Measurable	Access control	Rights management	Records management	Auditing	Reporting	E-Discovery
Documents																	
Contacts																	
Calendars																	
Tasks																	
Lists																	
Forms																	
Media																	
Business Data																	
Business Intelligence																	
Conversations																	

Choose a content type from the left column and score the top row requirements from 0 to 5, with 5 being a top priority.

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Colligo helps organizations accelerate SharePoint/Office 365 adoption for content filing and sharing.

Our Colligo Engage platform includes highly engaging 'native' apps, multi-system sync technology and a management console. Colligo solutions are deployed in F500 enterprises and thousands of organizations of all types to increase productivity, support mobility and mitigate risk.

Colligo Engage
Management Console

Colligo Engage
Apps

Colligo
Engage
Sync

OneDrive
for Business

Office 365
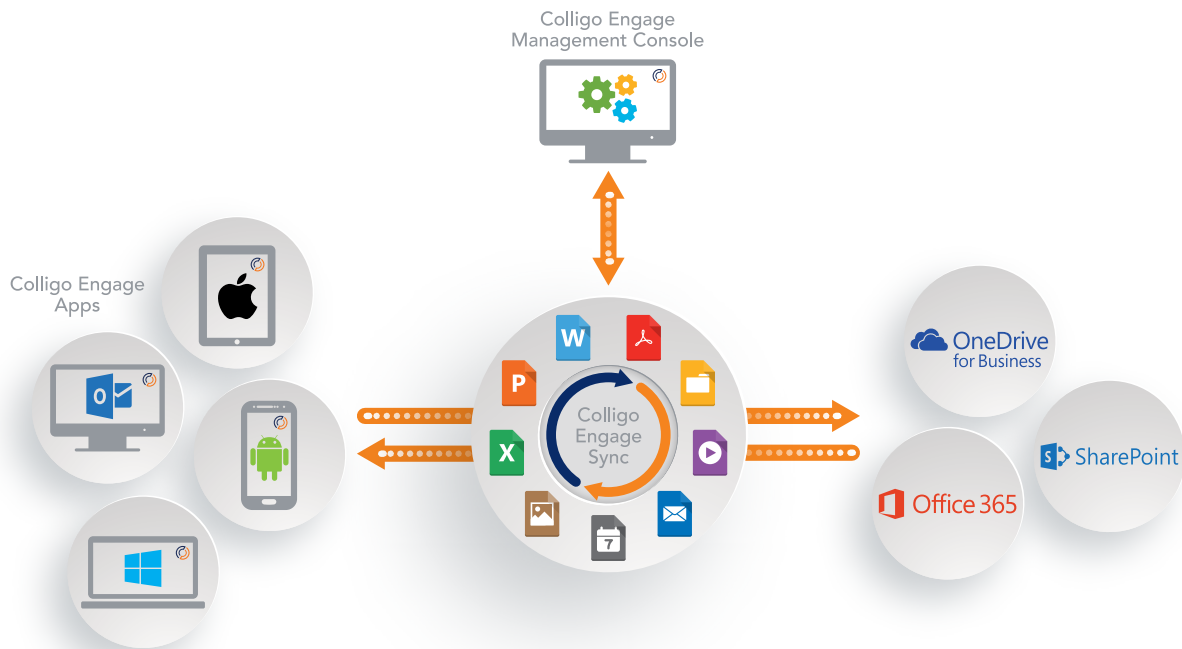
SharePoint

Next Steps

You've invested time and money to deploy SharePoint. Now is the time to fully leverage your system for the unique business scenarios of your mobile users. Take this opportunity to do it right!

www.colligo.com/request-demo-form/

Meet the Authors

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Dan Holme's 20 years of experience and his impact on hundreds of thousands of IT professionals and business decision makers have earned him a reputation as one of the world's most respected analysts, consultants, authors and experts on Microsoft technologies. A native of Colorado, resident of Maui and graduate of Yale, Dan has been recognized as an MVP for nine years across three technologies, and is one of the top ten partner MVPs in the world. Dan has penned hundreds of articles for SharePointProMag.com and numerous best-selling books for Microsoft Press. Dan also serves as the Microsoft Technologies Consultant for NBC Olympics.
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Barry is the founder and CEO of Colligo, and has been a technology innovator and entrepreneur for over 25 years. Barry is a recognized expert on SharePoint client technology and a frequent speaker at SharePoint and Enterprise Content Management (ECM) conferences worldwide. He manages Colligo's popular SharePoint blog, which discusses important issues in email and records management, governance and compliance, as well as technology trends affecting the SharePoint and ECM market. Barry holds degrees in Science and Electrical Engineering and was named Ernst and Young's 1997 Pacific Region 'Entrepreneur of the Year' for Technology.
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