

The SYWARE logo is displayed in a bold, italicized, red font with a black outline, set against a yellow rectangular background.

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## Pocket PC Development Provides Sales Force Tool for Coca Cola

"If we can make a \$500 handheld device to do the same thing as a \$4000 laptop, we've saved a ton of money."

- Billy Wang, Business Development Manager, Coca Cola Corporation

*The Coca-Cola Company*

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Competition is fierce in the soft drink industry. Behind the placement of every vending machine is a detailed strategy designed to identify and win the most attractive revenue-generating opportunities.

Coca Cola has embarked on an initiative to find the most effective portable selling tool to support its field sales force - the people who go out and prospect for new locations and customers. Sales personnel have access to a sophisticated customer management system running on their desktop PCs. However, when they went out on the road, they were still keeping track of their sales contacts using pen and paper. This was inefficient - it meant that information had to be entered twice, first by hand in the field, and then into the management system on the desktop when they got back to the office.

The objective was to automate the collection of information about sales calls, customers, and prospects. However, rather than equip each sales person with an expensive laptop PC, the company decided to investigate whether a more affordable Pocket PC handheld device could provide the necessary functionality.

In addition to the cost savings, the convenience of this approach was obvious. When you're on the go, it's much easier to point and click using radio buttons and drop down menus, rather than fumbling with the keyboard and mouse on a laptop. The goal of the Pocket PC development project was to create a sales management application that could integrate with the existing web based SQL Server business applications running on the desktop.

### Pocket PC Development Provides a Customized Solution

Since suitable off-the-shelf applications were not available, the company needed to develop a customized solution. The Pocket PC development project fell to Billy Wang, Business Development Manager for Coca Cola's Southern California division. Utilizing SYWARE's Visual CE®, he was able to develop a contact management application for the Pocket PC that interacts with the division's desktop customer management system. Visual CE offers a highly intuitive drag and drop development environment that allows users to create customized forms and databases without previous programming experience.

Wang downloaded the Visual CE software, spent a few days with it, made a few calls for support, and within a few days completed the Pocket PC development effort. "I'm fairly computer literate, but not a programmer by any means. However, this was very simple to use - just point and click."

Using Visual CE, Wang developed online forms that are being used to capture customer data, competitive information, equipment surveys, employee demographics, and business opportunities. The information is captured using the Visual CE screens running on the Pocket PC, and then mapped to the customer management system running on the desktop.

"It's really quite amazing," he adds. "With the ability to point and click through the wizard windows, and a few minor adjustments, the application almost developed itself."

### How It Works

A sales manager working on a desktop will access a list of sales leads from a company intranet site and assign certain contacts to a sales person. The next time that sales person synchronizes between the desktop and handheld, the new contacts are transferred to the Visual CE contact management application running on the handheld. When the sales rep makes a sales call, they capture information about the customer and location using Visual CE. The next time they synchronize, the new data integrates back to the central SQL Server relational database, eliminating the need for duplicate keying.

The new system automatically keeps the sales force up to date with the latest information about customers and prospects. Rather than relying on pen and paper, they now have a current database full of customers on their Pocket PC. In addition, the data captured in the field allows Wang and his colleagues to develop more effective sales programs because they now have rapid access to detailed customer information.

### The 21st Century Sales Force

In addition to the added efficiency, the Pocket PC development project was also good for morale. "Our sales reps have been dying for something like this," Wang adds. They were accustomed to seeing salespeople from other industries walking around with the latest technology while they were still writing by hand in their Franklin planners. Now they have joined the 21st century sales force."

The solution is currently being tested in the field, with plans for rolling it out to all 80 sales representatives across the Southern California division. Ultimately, it will be offered for use by the Coca-Cola sales force nationwide. Additional screen and modules are also planned.

"Using Visual CE, we've been able to make that \$500 handheld device work like a \$4000 PC," says Wang. "With over 80 salespeople in our division alone, you can get an idea of the savings."

