



Rethinking TELEMATICS

A Field Guide to Integrating Telematics in Salesforce

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Where Next: A Field Guide to Integrating Salesforce and Telematics

There are more than 12.6 million fleet vehicles on the road in the U.S.¹ Field sales and service reps use them to meet with, service, and sell to customers. These field sales and service activities are the lifeblood of many companies, which is why companies spend billions each year managing these fleets with telematics. But, it's time to rethink telematics to make fleets more customer- and rep-friendly.

Sales, service, and fleet managers use a wide variety of telematics to get the most of their vehicles. They use Salesforce to manage their customer relationships and sales activities. The most forward-looking of these companies are driving efficiencies, reducing costs, and improving customer engagement by integrating Salesforce and their telematics solutions. These leaders recognize that fleet management must be tied to sales and service priorities to maximize revenue and efficiency while minimizing total cost of ownership (TCO).

Integrating telematics data and Salesforce allows companies to strategically prioritize customer visits, empower field reps with critical information from CRM, optimize travel time, and control fleet-related expense.

This is the era of CRM-driven telematics. Now, for the first time, integration between telematics and Salesforce can maximize sales and customer satisfaction, create efficiencies, and improve fleet ROI. This guide will explore how to integrate your telematics solutions with Salesforce using a geo-productivity platform such as MapAnything.



Integrated Salesforce and telematics boosts customer satisfaction and transforms your field sales and service organization from a cost center to a profit center with route, schedule, and territory coverage optimization.

Breaking Down the Silos

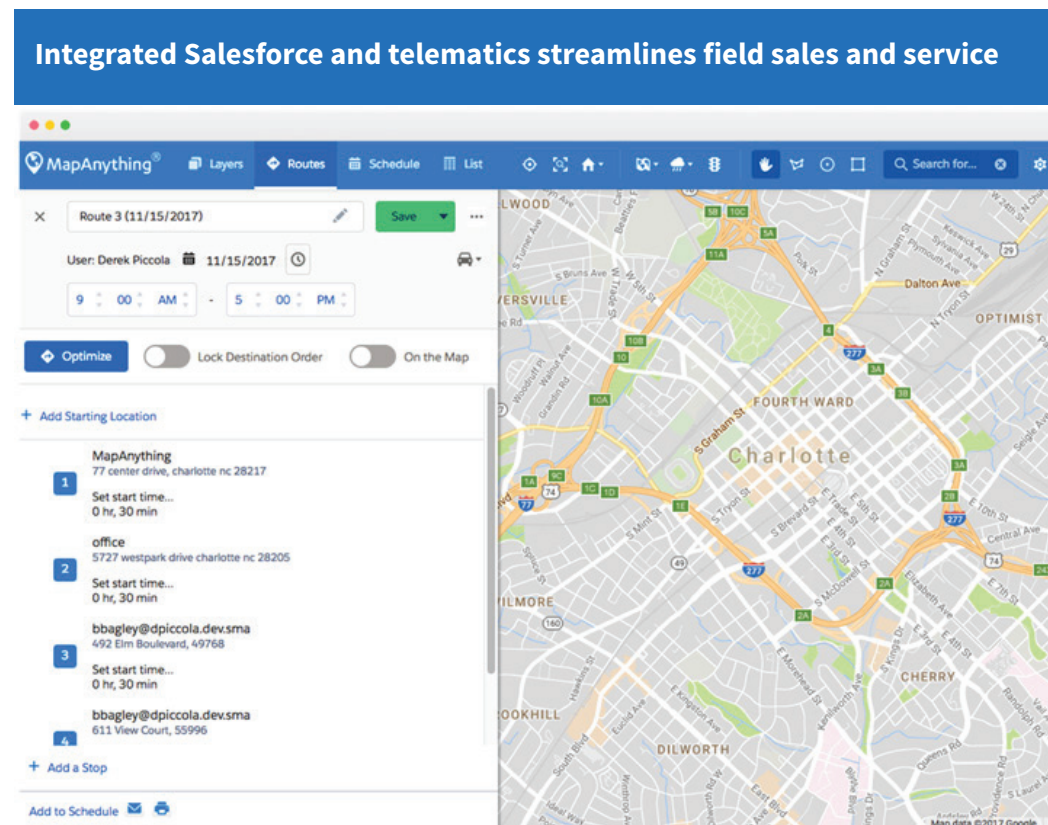
Traditional telematics is a proven way to reduce costs. Fleet managers rely on telematics to proactively flag vehicles for maintenance, track vehicle location, manage fuel use, monitor driving habits to improve safety, and meet compliance requirements.

Millions of field sales and service executives rely on Salesforce to drive sales productivity and customer satisfaction, as reps focus on the right customers with the right information in hand at every meeting.

So, you have one system of record for the vehicle, and another for the driver. Does that make sense?

Beyond cost reduction, new productivity and efficiency benefits can come from getting these critical systems out of silos. Integrating telematics data and Salesforce allows field reps to see more customers, sell more, and increase customer satisfaction as they drive company vehicles.

MapAnything prioritizes sales and service calls based on customer need and opportunity, therefore driving revenue and improving customer engagement. Sales and service leaders are able to leverage telematics data to drive rep accountability and productivity while automating many of the administrative tasks within Salesforce — leaving more time for selling. At the same time, fleet managers are able to use integrated data to reduce costs and improve efficiency.



On-demand Sales and Service is a Reality in the B2B World

It's an "on-demand" economy. We can order taxis with the click of a button and book restaurant reservations from smartphones in no time flat. These digital conveniences are so commonplace that customers have come to expect the same high level of customer service in every interaction, regardless of industry. Now it's time for all B2B field sales and service leaders to embrace the on-demand economy as they deliver fast, flawless customer service and sales interactions. Those who don't will be left behind.

Through integration of telematics and customer data within Salesforce via Sales Cloud™ or Field Service Lightning™, MapAnything displays all the information needed for on-demand sales. And, it does so on a map-based interface. Customers can get products and services when and where they want them. Field reps gain productivity with smarter routing and CRM data at their fingertips. The result is increased sales and customer satisfaction.



“Google Express, Amazon Prime Now, Uber, Lyft, DoorDash ... these are all examples of services that have transformed customer experience forever. By integrating telematics with Salesforce, field sales and service leaders can deliver their own customer service innovations to keep pace with this new reality and grow revenue along the way.”

- John Stewart, CEO, MapAnything



The Road to Next Generation Customer Service

Customers want on-demand service. No matter how good your product is, getting it to the customer on time, when a customer needs it, ensures longer, more profitable relationships.

Slash late deliveries: No customer has time for late deliveries. A poll of over 500 B2B customers shows that 55% of customers would stop using a company's products after two or three late deliveries. How can you avoid late deliveries?²

- Consider weather delays in route planning to avoid delays. Every year companies lose around 32.6 billion hours due to weather-related traffic congestion. Worse, in addition to frustrated customers, the cost of delays ranges from \$2.2 billion to \$3.5 billion annually.³
- Outsmart traffic by building a customer location-optimized schedule with geo-productive route planning. Traffic congestion costs commercial truck drivers \$27 billion annually in lost time and fuel—not to mention wear and tear on vehicles.⁴

Get to the most valuable customers in a shorter time: Prioritize sales meetings by customer need and driving efficiency. Fleets that use route-planning software see an average of 13% increase in stops per vehicle per day.⁵

“For their part, customers accustomed to the immediacy, personalization, and convenience that characterize digital-marketing pioneers such as Amazon and Google now expect the same service from all players. This paradigm is raising the stakes.”

-McKinsey & Company



Planning Your Telematics and Salesforce Integration

Every transformation requires planning. The following steps will help you organize your approach to next-generation telematics with CRM.

Step 1: Outline Your Key Objectives

As a field sales or service leader, fleet manager or business owner, you know that smart telematics can help you reduce costs and uncover new efficiencies. Imagine if you could also add new, more sweeping business objectives to your list, such as greater rep productivity, revenue growth and improved customer interactions, and higher loyalty. Standalone telematics is probably already delivering savings, but integration with Salesforce provides new opportunities.

	Standalone Telematics	Salesforce Integration
Lowering costs		
Safety and compliance (insurance, accidents, maintenance, etc.)		
Fuel and idle time		
Overtime/payroll		
Driver accountability and efficiency		
Smarter business decisions based on live location of assets		
Automated recording of sales, service check-ins		
Planned vs. completed routes		
Daily summaries of customer interactions		
Improved customer experiences		
Greater profitability		
Uber-like services		

Step 2: Build Your ROI Model for Productivity

How will you know if your investment in integrated Salesforce and telematics is a success? Start by identifying qualitative and quantitative metrics that can enable new efficiencies. Examples might include number of stops per day, increase or decrease in fuel costs and fleet expense, or reduction of overtime hours as drivers navigate traffic to complete their routes each day. The following are other suggested areas where metrics can prove ROI.

Maintenance – Measure and extend the life of your fleet. A 5-10% improvement in the overall life of an asset can save between \$30-70k . Reduce vehicle downtime by proactively tracking maintenance schedules and optimizing for productivity and vehicle longevity.⁶

Productivity and revenue – Improve productivity by automating Salesforce or telematics data entry. Field sales and service teams that use integrated telematics and CRM eliminate 80% of manual tasks like tracking mileage, determining their best routes, and logging activities post-sales or post-service call. Fleets that use route-planning software see an average of 13% increase in customer visits per day.⁷

How much productivity can you gain?



Hours saved by eliminating manual tasks like logging CRM data or tracking mileage



Time saved through route and schedule optimization



Increase in retention and customer experience due to faster response time

**Result =
More revenue from more visits
or work orders per week**



Build Your ROI Model for Cost

Safe driving lowers TCO – Accident costs range from \$74,000 to over \$500,000 in hard costs. Good driving also reduces costs. Demonstrating good driving by monitoring a number of different factors such as time of journey, speed, cornering, acceleration, braking, and familiarity of routes using telematics can reduce insurance costs by 25%.⁸

Customer experience – It costs much more to win a new customer than it does to expand the business you do with an existing one. And, the competition is just a click away. Research shows that 55% of customers would stop using a company's products after just two or three late deliveries.⁹

Lower wasted fuel costs – Idling costs fleet owners between \$5,000-\$12,000 per vehicle per year in addition to adding unnecessary engine hours which have a negative impact on the environment. Every year, companies in the U.S. lose approximately 33 billion hours due to congestion. Telematics solutions, combined with Salesforce and map-based routing data, dramatically reduce time wasted in traffic or idle time associated with mismanaged schedules.¹⁰

Compliance – The Electronic Logging Device (ELD) mandate went into effect on December 18th, 2017. Fines for non-compliance can range anywhere from \$1,000-\$11,000 per incident. Ensure you have an ELD-compliant solution if you're subject to the regulations. Think broadly about other compliance mandates you may need to consider. For instance, streamline IFTA reporting for personal mileage and avoid HOS violations.¹¹



Reduction in fuel costs



Increased engine life by eliminating excessive idle time



Cheaper insurance rates though better driver safety



Elimination of fines from HOS or other compliance issues

Result = Savings



📍 Step 3: Select a Deployment Approach That Works for Your Business

There are three approaches to telematics: 1) mobile only — the ability to track location and routing data on a driver's smartphone; 2) telematics integration with on-board diagnostics solutions (OBD-II devices) within vehicles or directly from systems like GM OnStar — commonly used by fleet managers today; and 3) telematics integrated directly within Salesforce and viewable in a map-based interface on a geo-productivity platform.

MapAnything combines telematics and customer data within Salesforce and brings both customer and telematics data to life in a map-based interface. This fully integrated approach gives field sales and service reps all the benefits of CRM, sales priorities, and product information at their fingertips, and it adds optimized scheduling and route planning for maximum productivity. In addition, field sales and service executives, as well as fleet managers, reduce TCO while improving customer engagement, CRM adoption, and sales productivity.

Interface built for field reps – Telematics data and Salesforce data should be displayed in one integrated interface with schedule, customer location and CRM data, and optimized route planning.

Mobile platform support – Availability on both iOS and Android smartphones and tablets, as well as online, is essential to provide maximum flexibility and ease of use while driving Salesforce adoption.

Map-based interface – Native integration with Salesforce enables users to see the location of customers, vehicles, and assets, allowing more efficient use of fleets and increasing field rep accountability.



📍 Step 4: Select a Geo-Productivity Solution That Works Now and in the Future

Once you have outlined your objectives and established the metrics by which you'll measure your success, you'll need to select a vendor with the right technology, the right experience, and a deep integration with Salesforce. The following checklist will help you determine which vendor is right for you.

- ✓ **Integration process** – Is the vendor fully integrated with Salesforce?
What work needs to be done to get the data exactly where you want it?
Will this work be done by someone on your team, or by the vendor?
- ✓ **Configurability** – If you don't like the reports and information packaged in your telematics portal, can you change them?
- ✓ **Security** – Where and how is your data hosted? Who has access to it?
Do permissions align with your corporate security structure?
- ✓ **Scale** – How many and what types of telematics devices can your deployment support? Is there a limit to the number of devices which can be supported at any given time? Can the solution scale to meet the needs of your business in the future?
- ✓ **Data and storage** – How is your telematics data stored? Hosting your data on a cloud-based geo-productivity platform like MapAnything could be more cost-effective and efficient than other options.
- ✓ **Device options** – How many variations of devices can your solution support?
How flexible is the intake engine? Can you normalize the intake streams into a logical output? Does the solution support a variety of hardware to cover all the variability of your fleet, or even a mix of telematics devices and phones?
- ✓ **Normalization of data** – Different vehicles and telematics devices transmit data via different protocols. Can your vendor help you normalize that incoming stream of values ("speed," "odometer," "idle time"...)?
- ✓ **Rules engine** – Does the vendor provide flexibility with customizable, rule-based automations?
- ✓ **Interoperability with Salesforce** – Can the solution trigger Salesforce events with IoT data such as the state of a customer, account, or opportunity?
- ✓ **Extensibility and future integrations** – What if you want to customize your IoT solution with other mobile apps or websites? What options are available for custom development on the platform?

📍 Step 5: Get Your Business Ready

You may be ready to hit the ground running with your telematics implementation in Salesforce, but your CRM infrastructure and business rules engines may still need work. Take inventory of your internal systems to ensure your infrastructure is ready to go so you can avoid missteps and costly rework down the road. The following activities will help you prepare for the project.



Assign vehicles to key business segments – Segment your vehicles and their associated data to align with the departments within your organization that use them.

Define key terms – Key terms are essential for metrics and communication. For example, is there a common definition across the organization for a “stop”? Are your drivers stopping at three locations a day or 30? Do you need to distinguish a business stop from a pause at a stoplight, a quick coffee refill, etc.?

Define reporting needs – What reports do you need to see? What are the most important metrics for you to track on a real-time, daily, and weekly basis?

Set business rules that manage driver behavior – Set business rules that drivers understand and that telematics can track. For example, what does your company consider as speeding – one mile over the limit or 20?

Define boundaries – Set up geo-fences. What objects are you geo-fencing? Do you need to draw any custom fences on the map?

Define IoT data and Salesforce triggers – Define your IoT rules. Determine which triggers you want to enable with telematics data. Set up workflows that will be initiated when a condition triggers a Salesforce event.

Define clear roles, performance expectations, and goals – Assign key stakeholders at every step of implementation to ensure appropriate processes and accountability.

📍 Step 6: Build an Execution Plan and Assess Support Requirements

40% of fleet operators focus on fuel, maintenance and uptime to improve the bottom line¹²

22% growth in cross-sell revenue is achieved by improved customer engagement¹³

13%-51% improvement in revenue is possible through better customer engagement¹⁴



Implementation, if not well-executed, can be the downfall of even the most well-laid plans. The following questions will help you gain an understanding of implementation strategies, support requirements, project timelines, and acceptance requirements.



Engage the stakeholders – Who will benefit most from the integration between telematics and Salesforce? Do they understand the need for the new approach and are they bought in? Do they (or should they) have a role in the project?



Look for efficiencies – What business processes can be automated or streamlined as you integrate telematics and Salesforce? How will you prioritize and measure this automation?



Create a champion who is tasked and enabled to lead the project – Who is the project lead? Will the project be implemented by field sales or service leaders, the fleet manager, or business owner? Who needs to be involved to ensure success of the project? Who will be the project “lead” for the implementation in Salesforce within your organization?



Consider what other systems will be affected – Is there a need to integrate other applications or services? Can your vendor help you navigate this integration if necessary?

MapAnything: Geo-Productivity for Salesforce and Telematics

One unified system drives measurable results

MapAnything brings telematics into Salesforce to increase fleet productivity across sales and service. Native Salesforce implementation eliminates development and provides complete, seamless integration of telematics data. Leverage the business rules and workflows you've already established so you can efficiently manage your team and the fleet they rely on from within Salesforce. MapAnything integrates Salesforce and telematics data to make it easier for field sales and service executives to drive revenue, improve customer engagement, uncover new efficiencies, and reduce costs.

Field Sales Leaders

- Automate activity logging and CRM administrative tasks to spend more time selling
- Provide daily activity reports to management
- Track accurate mileage for reimbursement

Field Service Leaders

- Provide accurate arrival times to customers
- Capture time spent at each stop for accurate, auditable billing
- Dispatch teams based on location of work order and nearest field rep

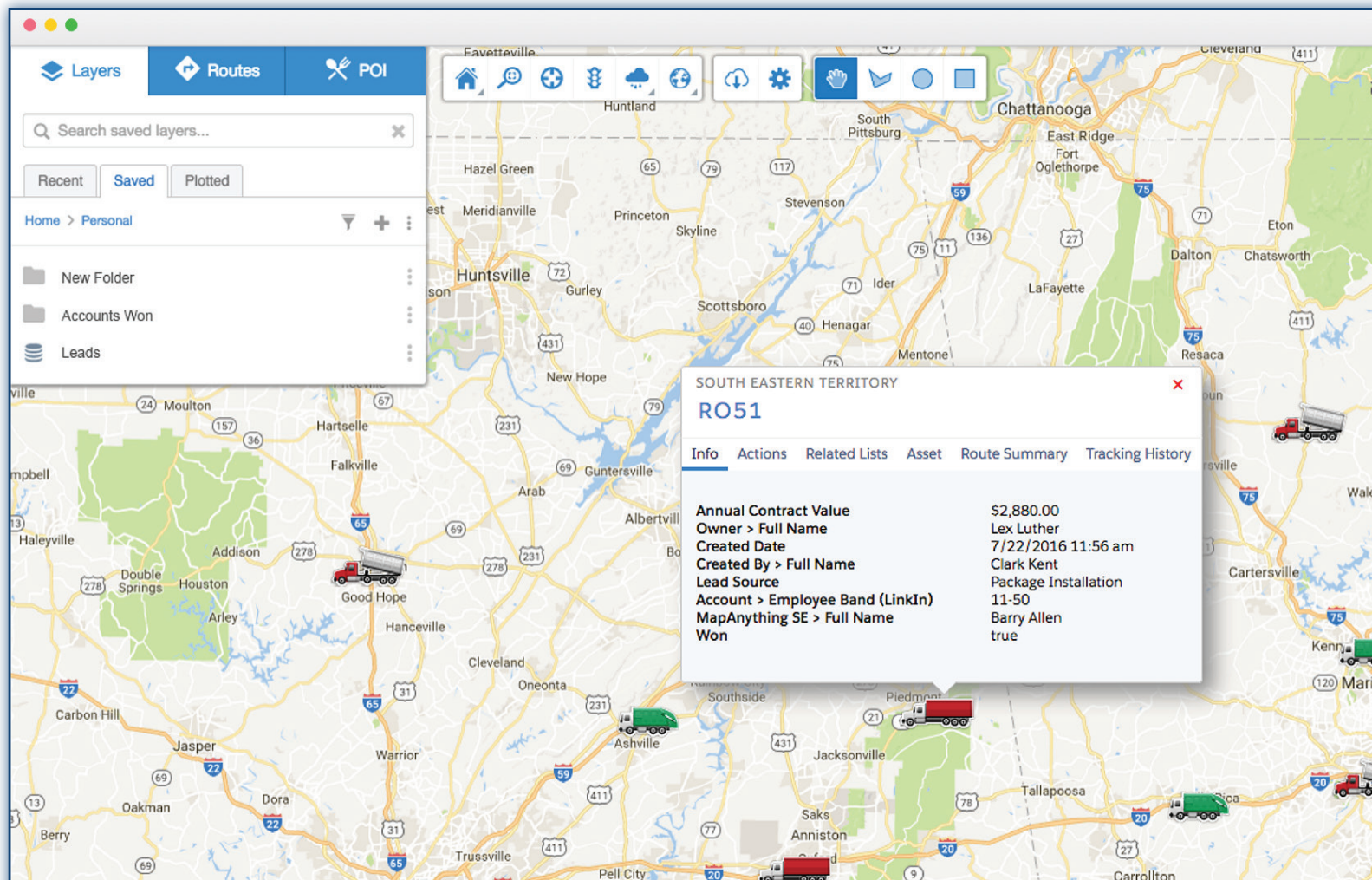
Fleet Managers

- Lower TCO of all fleet operations
- Manage customer data, dispatch vehicles, and optimize routes for maximum productivity
- Improve uptime, reduce daily mileage, and receive maintenance alerts in real-time
- Reduce idle time and time wasted in traffic due to weather or congestion
- Monitor vehicle, speed, direction, distance traveled, ignition on/off, hard braking, rapid acceleration, seatbelt, fuel consumption, and other customizable factors
- View vehicle or asset location in real-time on an interactive map

**“We’re now able to
prioritize our visits
by client potential
and SLAs, increasing
our visit frequency
at target accounts.”**

-Matt Bengtson, Mohawk Industries





“MapAnything provides geo-productivity software that uses IoT, telematics, and mobile devices to service assets in the field. MapAnything Live provides data streams from equipment and assets to enhance field service scheduling and asset optimization, providing a bridge from telematics to field service management applications and systems of record.”

- IDC Innovators: Field Service for Manufacturing, 2017



Conclusion

The convergence of telematics and Salesforce is a leap forward for field service and sales leaders, field reps and the fleet managers, and business owners who support them. Field sales and service is the revenue engine of most companies. Finding synergies between Salesforce, which is the system of work, and fleet management introduces new efficiencies. It reduces costs while providing the opportunity for greater customer engagement and increased sales. Automation reduces CRM admin and increases Salesforce adoption, while managers have access to a more complete view of rep activity and results. Finally, integration between Salesforce and telematics increases safety and compliance, and helps companies maximize the return on investment of fleet vehicles.

MapAnything is a leader and pioneer in geo-productivity software for Salesforce. Natively built for the Salesforce platform, only MapAnything is able to fully integrate with the workflow and data used by millions of field sales and service reps and their managers each day.

Sources:

- | | | | | |
|---|---|----------------------|----------------------------------|-----------------------------|
| 1 - IHS Research | 4 - U.S. Federal Highway Administration | 7 - VoxWare | 10 - Engines Off! Colorado, 2016 | |
| 2 -VoxWare, 2016 | 5 - FleetBeat Report | 8 - FleetBeat Report | 11 - IFTA | 13 - Constellation Research |
| 3 - U.S. Federal Highway Administration | 6 - FleetBeat Report | 9 - VoxWare | 12 - MapAnything research | 14 - Constellation Research |

“We were struggling to integrate our legacy telematics provider into Salesforce. Our old vendor quoted tens of thousands of dollars just to connect the systems, without any plan to maintain or support the integration. By switching to MapAnything, we were able to gain the benefits of integration while avoiding a costly and lengthy custom implementation.”

– Westmor Industries

About MapAnything

Combine today's global economy with a mobile workforce and you get a lot of moving parts. CRM alone can't help you answer the critical business questions: Where is my business? Where do I need to be?

Founded in 2009, MapAnything is an innovator and pioneer in Geo-productivity software. With nearly 2,000 customers globally, ranging from large enterprises to small businesses, we believe that "Where Matters."

MapAnything is a Salesforce Gold App Innovation Partner and a ServiceNow Technology Partner. The company has received the Ventana Research 2016 Technology Innovation Award for Location Analytics, IDC Innovators: Field Service for Manufacturing 2017 award, and been named a Customer's Choice – Highly Reviewed App by users of Salesforce.



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