

CWR Mobile CRM

CWR Mobile CRM is a Microsoft Certified Solution for Microsoft™ Dynamics™ CRM 3.0

Gizmo Gets Gadgets Going with help from CWR Mobility's Mobile CRM

When you have a workforce that is constantly on the road rather than in the office or on the shop floor, you need to be able to provide current and accurate customer data. And when you are a company like Gizmo, the system you choose to provide this data is especially critical.

Gizmo

Gizmo is an IT services company that provides technical support for a wide range of home technologies. It has a head office in Sydney, Australia and operations in Brisbane, Canberra and Melbourne. The premise behind Gizmo is to provide home users with the technical support they need to get the most out of their equipment. With technicians constantly on the road, Gizmo's operations had to be paperless and wireless. The company also wanted to achieve real-time invoicing through one simple electronic transaction.

Gizmo management started looking for a customer relationship management (CRM) application to support its customer service representatives and help deliver concise and accurate information to mobile technicians (Gizmo's Gadgets) on the road using personal digital assistants (PDAs).

Integrated Service solution

When a customer calls the Gizmo contact center, the details are entered into a customer database built on Microsoft Dynamics CRM 3.0. If a customer's problem can't be solved over the phone, the details are sent in real time to a mobile technician's PDA using CWR Mobility's Mobile CRM. They synchronize in real time with Gizmo's CRM server over a 3G wireless broadband network. From their PDAs, technicians can access their schedules, customer information, case notes and payment details. Knowledge sharing is an integral concern for Gizmo. With a widely distributed workforce, it is important for everyone to feel connected and part of the broader organization.

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Because we have a large mobile workforce, we had to make sure that all our systems were available outside the office.

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With Mobile CRM our techs can close cases on site. Before Mobile CRM, techs would have to wait to get back to the office before they could close cases.

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Business Situation

Gizmo's mobile technicians needed up-to-date schedules and accurate customer data. The company needed to get the right technician to the right job at the right time.

Solution

Microsoft Dynamics CRM in combination with CWR Mobile CRM, a PDA based version of Microsoft CRM developed by CWR Mobility BV in the Netherlands. The technicians synchronize in real time with Gizmo's CRM server over a 3G wireless broadband network. From their PDAs, technicians can access their schedules, customer information, case notes and payment details.

Benefits

- Accurate scheduling of mobile technicians
- Efficient use of staff time
- Streamline of invoice processing
- Improved collaboration between staff
- Rapid deployment and scalability

Hardware

- i-Mate JasJar PDAs

Partner(s)

- Bortell
- CWR Mobility BV

Software and Services

- Microsoft Dynamics CRM 3.0
- CWR Mobile CRM
- Microsoft Dynamics GP 9.0
- Microsoft MapPoint 2004
- Microsoft Office Live Communications Server 2005
- Microsoft Office SharePoint Server 2007
- Microsoft SQL Server 2005
- Windows Mobile 5.0

Vertical Industries

IT Services

Country/Region

Australia

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In the palm of their hand

Mobile CRM ensures Gizmo technicians in the field can get near real time updates so customer service representatives don't need to call the technicians every time there is a new or updated case. Technicians simply refer to their PDA for details about upcoming jobs.

"With Mobile CRM all of our techs have, in the palm of their hand, all of the information they need about a customer's case before they knock on the door," says Troy Cox. "They have their schedule, the customer's contact details and address, case notes about the issue and even driving instructions."

Microsoft certified partner Bortell, a solution partner with CWR Mobility, implemented Gizmo's CRM system. It designed a connector between Microsoft Dynamics CRM and Microsoft Dynamics GP, which manages Gizmo's finances, e-commerce and supply chain. This system works seamlessly with CWR Mobility's Mobile CRM. Technicians can close the job from their PDA and the system automatically creates an invoice in real time and processes the credit card payment. The customer is automatically emailed an invoice in PDF format. The system uses SecurePay, a third-party payment gateway to ensure the process is safe and secure.

"With Mobile CRM our techs can close cases on site. Before Mobile CRM, techs would have to wait to get back to the office [often several days later] before they could close cases", says Troy Cox. "By closing the case immediately after it has been completed, it means that we receive revenue from the case instantly, instead of having to wait several days. This has dramatically improved our cash flow and revenue recognition."

About Microsoft Dynamics and CWR Mobility

Microsoft Dynamics is a line of integrated, adaptable business management solutions that enables you and your people to make business decisions with greater confidence. Microsoft Dynamics works like familiar Microsoft software such as Microsoft Office, which means less of a learning curve for your people, so they can get up and running quickly and focus on what's most important. And because it is from Microsoft, it easily works with the systems that your company already has implemented.

CWR Mobility's Mobile CRM is built specifically for mobile sales and service professionals' providing them with an unrivaled user experience through an intuitive, graphical user interface based on the Dynamics look and feel.

CWR Mobility's Mobile CRM delivers a user-friendly interface on Windows Mobile devices for intuitive CRM data access and entry by the mobile professional, both while the device is connected online to a wireless service provider and offline, such as in an airplane, or deep inside a customer's warehouse.

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Microsoft Business Solutions
ISV/Software Solutions



Microsoft Dynamics

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