

## Gizmo Gets Workforce Going with Help from CWR Mobile CRM

*With a workforce that is constantly on the road, Gizmo needs to provide its mobile technicians with the most up-to-date and accurate customer data and to speed up invoicing to improve cash flow.*

### Gizmo

Gizmo is an Australian IT services company that provides comprehensive in-home or phone technical support for a wide range of technologies used in the home. The company's mission is to provide home users with the technical support they need to get the most out of their computers or other equipment. In addition to its head office in Sydney, Gizmo has operations in Brisbane, Canberra and Melbourne.

### Business Situation

Gizmo's service technicians, known as "gizmotechs," are constantly on the road. They drive to customer's homes with a promise to complete most jobs the same day or the next day after the customer calls. With technicians constantly on the road, Gizmo needed to transition its operations to a paperless and wireless system. "Because we have a large mobile workforce, we had to make sure that all our systems were available outside the office," says Troy Cox of Gizmo.

*"With CWR Mobile CRM, our tech can close cases on site. This 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."*

The company also wanted to achieve real-time invoicing through one simple electronic transaction, to shorten billing and payment cycles. Gizmo management started looking for a customer relationship management (CRM) application to support its customer service representatives and to help deliver concise and accurate information to its mobile technicians.

### Solution

Microsoft certified partner Bortell, a solution partner with CWR Mobility, implemented Gizmo's CRM solution. When a customer calls the Gizmo contact center, a customer service representative enters the details into a database built on Microsoft Dynamics CRM 3.0. If the customer's problem cannot be solved over the phone, the details are sent in real time to a mobile technician's mobile device using CWR Mobile CRM.



### Company Name

Gizmo

### Industry

IT support for in-home users

### Regional Area

Australia

### Business Situation

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

### Requirements

- Up-to-date customer information for mobile sales force
- Paperless and wireless system for relaying customer data
- Real-time invoicing system that synthesizes customer and e-commerce data

CWR Mobile CRM gives gizmotechs in the field real-time updates, eliminating the need for customer service representatives to call the technicians about every case. Technicians simply refer to their mobile devices for details about current and upcoming jobs. All technicians' mobile devices synchronize in real time with Gizmo's CRM server over a 3G wireless broadband network, so technicians can constantly access updated schedules, customer information, case notes and payment details.

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

## Real-time invoicing and faster payments lead to improved cash flow

In addition to the CRM database, Bortell 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 Mobile CRM. The result is that when a technician closes a job from his or her mobile device, the system automatically creates an invoice in real time, emails an invoice to the customer in PDF format, and processes the credit card payment. The system uses SecurePay, a third-party payment gateway to ensure the process is safe and secure.

"With CWR Mobile CRM, our tech can close cases on site," adds Cox. "Before Mobile CRM, techs would have to wait to get back to the office, often several days later, before they could close cases. 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."

With more productive technicians, satisfied customers, and improved cash flow, CWR Mobile CRM gets Gizmo going every day.

## Solution

Microsoft Dynamics CRM combined with CWR Mobile CRM allows Gizmo's technicians to synchronize in real time with Gizmo's CRM server over a 3G wireless broadband network. From their mobile devices, technicians can access their schedules, customer information, case notes and payment details.

## Products

- CWR Mobile CRM
- Microsoft Dynamics CRM 3.0
- 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

## Key Benefits

- Accurate scheduling of mobile force
- Efficient use of staff time
- Streamlined invoice processing
- Rapid deployment and scalability

## About CWR Mobility

At CWR Mobility our mission is to give you the Power of Close™, the power to get closer to customers and stay there, to increase customer satisfaction and loyalty, to reduce the costs of customer interaction, and to create a more agile and effective customer-facing organization. Our market leading product, CWR Mobile CRM, puts the power of Dynamics in the palms of your employees' hands, on their own mobile devices.

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