



## **Hosted Microsoft Dynamics CRM** **Optimising Working Processes for Distributor**

**Client :** GG Glass  
**Vertical Market :** Distribution  
**Requirement :** GG Glass needed a solution to record, track and process.  
**Solution:** Microsoft Dynamics 4.0 CRM Hosted

### **Benefits to GG Glass of Microsoft CRM delivered by Caltech :**

Ability to log calls from their customer base  
Consolidation of all customer base contact information  
Linking of emails and documents  
Ability to use CRM from Order to Invoice  
Improved customer service and organised process  
Improved reporting

**“You just ask for something and its done. Caltech have given us an exceptional service, their ideas and influence to use the system will really work for GG Glass” Cath Booth-Thomas GG Glass Ltd**

GG Glass implemented a customer relationship management (CRM) solution from Caltech CRM, to bring together its contact information onto one centrally managed database allowing for clarity and order in its daily operations, from order to invoice.

GG Glass is an independent glass and glazing company offering a huge range of products and services for new build, refurbishment and maintenance projects. GG Glass is a new business that started trading in November 2008.

George Ireland Financial Director & Dennis Worrall Managing Director of GG Glass, and a former Directors of Greenberg Glass, purchased assets from the Liverpool glass firm. GG Glass have offices in London, Leeds, Scotland and Liverpool.



## **System Choice**

GG Glass, knew that as a new business, it needed a system that was capable of sharing information, recording and tracking orders and invoices, and to give a high level of management reporting. GG Glass Regional Director Richard Thomas explains,

**“The initial request was to use a system for logging and tracking jobs, orders and invoices.”**

During an initial meeting with Caltech CRM, Caltech discussed how a CRM system could work for them, grow with them as a business and be built to be very bespoke and tailored to their needs. There was a discussion around development of the system, economical spending and growth of the system and business.

Microsoft Dynamics 4.0 Hosted was chosen as the most appropriate solution that would work best for GG Glass’ requirements for a variety of reasons. It enables a strong focus on customer relationships and gives excellent management oversight, as well as giving staff an easy to use solution, that was familiar to them in Outlook. Hosted also allowed set up quickly, and was a relatively small outlay. Booth-Thomas explains,

**“Microsoft Dynamics CRM Hosted solution was a cost effective way for us to start using CRM. As a new business, we decided to start small and develop from there.”**

## **Implementation of the System**

Booth-Thomas goes on to explain,

“Caltech CRM created something especially for us. The system was tailored entirely to our needs, and was very logical and simple to use. The support through development has been fantastic.”

Caltech took time to understand GG Glass workflows and exactly how they wanted to use the system, and then built the system around this.



Steve Jones CRM Consultant for Caltech states “We implemented Microsoft Dynamics for GG Glass as a very tailored solution. It has been a smooth implementation, and has been successfully engaged by users.”

Booth-Thomas states,

“The ability to use advanced find to build reports, and the flexibility of segmentation is easy to use and very useful.”

### **Future**

Microsoft Dynamics CRM Hosted was the ideal CRM solution for GG Glass. As well as the practical advantages, this CRM tool has enabled staff to embrace this new business’ way of working and develop processes to work for it.

The CRM system delivered a one stop shop for all members of staff to have accessibility to look at all customer contact records so everyone can see information. It has offered an easy to use system that is being used to generate orders, invoices and purchase orders. Booth-Thomas concludes,

**“We know we are only scratching the surface of what CRM can do. We are looking forward to start doing more with it, as we have found that the solution is so effective that staff in other departments can start using it too.”**

Using Microsoft Dynamics CRM has enabled GG Glass to build their business processes. The next stage is to feed all the product codes into the system so that operators can pull out information of product descriptions to cut down on repetitive typing.

There is lots of flexibility available with this solution, and GG Glass are considering, in time, moving from Hosted to On Premise as the business grows.

Microsoft CRM has brought about significant changes to GG Glass and has set a great way of working for the future of the business.



### **The Wider Benefits**

The Caltech implemented solution brought a number of significant benefits to GG Glass:

- Improving business processes and increased efficiency of staff
- Ability to respond effectively to the demands of challenging markets
- Provision of outstanding customer service
- Capturing increased amount of customer data to allow easy customer account management
- Report and forecast using the system

### **Get in Touch**

To see how you can benefit from a Caltech solution, please contact us on 01924 507 280

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### **About Caltech**

Experts in the application of CRM (Customer Relationship Management); highly skilled in the software we implement, Caltech work hard with clients to understand their business requirements and deliver to their needs.

Established in 1999 and based in Yorkshire, Caltech are specialists in CRM and we are totally focused on our customers. We have consistently, and successfully, implemented CRM solutions from small 2 – 3 person companies, to some of the largest organisations in the FTSE 100.