

# Saving time and enjoying more relaxed weekends with Mobile CRM

## About Premier Glass Products LLC

PGP is a manufacturer's representative agency engaged in the promotion, sales and service of a variety of products purchased through the Construction Industry.

The agency combines over 160 years of industry experience to provide its customers and the architectural community a "premier" level of service. The company has local offices in the Dallas, Houston, and San Antonio/Austin areas.

### Solution

Resco Mobile CRM  
with Microsoft Dynamics CRM 2015

### Customer

PGP/ Premier Glass Products LLC

### Industry

Retail

### Organization Size

10-50 employees

### Headquarters

921 North Riverfront Blvd, Suite 200  
Dallas, Texas 75207

## Business Challenge

Back in 2011, PGP adopted a CRM system to move away from paper, business cards, and MS Excel spreadsheets. The company realized it needed to have all of its customer base in one central place to effectively manage sales calls and to keep up with the quotes provided to customers.

As a sales rep agency, PGP employs almost exclusively sales representatives whose day consists of customer visits. Hence, the need for a mobile solution arose shortly after adopting a CRM solution.

*"When we first looked for mobile solutions, we were looking for something that would work on our tablets. Instead of having to wait for our laptops to load in order to enter all that information into our CRM, we wanted to do it in real-time. **We wanted a solution where we wouldn't have to spend hours sitting at the desk, log in onto our laptops, and entering data at the end of the week when we got back home,**" Steven Smith, Design Consultant at PGP, reasoned.*

*"We were really needing CRM on the go. Having it on our desktops or laptops just wasn't working – we wanted to open up an iPad and be able to get to the information without having to wait for our computers to boot up."*

**Steven Smith**  
Design Consultant at PGP

## Solution

PGP approached Zero2Ten, its' MS Dynamics CRM provider, asking for a mobile solution that will work with their system. Already equipped with iPads bought for this purpose, the company was eager to get their system working in the field.

Zero2Ten proposed Resco Mobile CRM as a technical and economical suitable solution. PGP purchased licenses at the beginning of 2013, and now, years after working with the solution, sees the real difference it made.

*"We are a sales rep agency, so we go and visit our potential and existing customers throughout the day. Before we go in, we'll pull up info on what we've discussed the last time and touch on those points again. After the meeting, we log in the information and go to the next one," Steven explained how they use Resco Mobile CRM on a daily basis.*

As the app syncs up with Microsoft Dynamics CRM, Steven, at the end of each month, generates reports based off the data gathered with Resco Mobile CRM and sends them to manufacturers to showcase the number of sales calls made, as well as products discussed.

*"We use the app primarily for two things: **data entry and pulling up customer history.** It's been an excellent tool for us," Steven sums it up.*

## Benefits

### Time Savings

Steven noticed significant time savings after switching to using a mobile CRM solution.

Steven estimates: "Cumulatively, for a team of 8 employees, **it's saving our agency at least 10-15 hours a week, even more, just on data entry alone.**

When you think about it – opening up your computer, you got to wait for it to boot up, it just takes longer. With the Resco app, it's just one touch, go into the entity and start entering the data. It's that quick."

"We've seen Resco Mobile CRM as a means to save time, to keep up with quotes, and to have all information about our customers in one place – it's there, right at our fingertips."

Steven Smith  
Design Consultant at PGP

## Cost-Effectiveness

When evaluating mobile solutions, Resco turned out to be the most economical one for the value provided.

*"That was kind of the deciding factor, **a mobile app that could save us some money**, so we partnered with Resco," Steven explained.*

Furthermore, the mobile client helped PGP's employees ease into the CRM system itself, utilizing to the company's investment.

## User Acceptance

PGP's sales reps, were hesitant at first, they were not used to putting in the information into the CRM on the computer, let alone on an iPad.

*"They were kind of nervous about it, but now they have all embraced it, **seeing that it's a game changer** and saves a lot of time in the evenings and on the weekends," Steven pointed out.*

Since adopting Resco Mobile CRM, PGP's sales team uses the app almost exclusively.

*"I am pretty much the only sales rep within the company who would use the MS Dynamics CRM interface as I generate and send our reports. But other than that, **we use the Resco app probably around 95% of the time**," Steven estimates.*

## Customer Support

Resco's customer support is what surprised the company the most – helping out blithely throughout the years.

*"When I had a problem, Resco's support team would go ahead and set up a meeting and work with me on my screen, getting everything going. **The support was just superb.**" Steven Smith from PGP concluded.*



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