



Gas Safe Consultants increase efficiency with the help of Dynamics 365 Sales and Synergy Technology



Microsoft Dynamics 365
Sales



Introduction

Gas Safe Consultants Ltd is a specialist provider of gas safety training and consultancy, helping organisations that use compressed, cryogenic, industrial and LPG gases to work safely, efficiently and in line with best practice.

Established in 1991 and headquartered in Sandbach, Cheshire, the company supports clients ranging from businesses with a single gas user through to multi-site, multinational corporations. Its services cover the safe use, handling and storage of gas cylinders and cryogenic liquids such as liquid nitrogen and dry ice, delivered through both instructor-led workshops and an expanding portfolio of online courses under the gassafetytraining.com brand.

The organisation delivers thousands of learner engagements globally each year, underlining its position as a UK leader in gas safety awareness training and consultancy. To maintain quality while scaling operations, the business relies on robust internal systems to manage customers, bookings, training records and refresher schedules. As **Office Manager, Fiona Freer** oversees staff, processes and technology, ensuring systems support day-to-day operations and future growth. Her remit includes how the company uses Microsoft Dynamics and related tools, and she has been the driving force behind recent changes made to the system to improve efficiency.



The Challenge

When Fiona first joined Gas Safe Consultants, Microsoft Dynamics was being used in a very limited way. "Originally when I first started, we were using Dynamics purely as a database, our customers' and suppliers' information was stored in there and we'd keep a record of all the orders and that's all we were doing with it." As the business grew, this basic use meant critical information remained siloed in other places, creating duplicated effort and inconsistent data.

Taking on responsibility for systems, Fiona recognised that Dynamics could do far more. "When I became the office manager and it became my remit, I started talking with Synergy because I know from previous employment that Dynamics has got far greater capabilities than we were using. So we're now looking at using it more as a complete business tool rather than just a database."

Fiona explains "Our previous work practices were slightly outdated in that we had lots of spreadsheets that we used, and lots of physical customer files. So you'd have to go from the CRM, look in the customer file, go out into SharePoint and look at a spreadsheet, there were a lot of different steps in the process." This fragmented approach slowed down day-to-day work, especially in finance and administration, and growing data volumes were driving up storage costs in Dynamics.



The Solution: Integrating Dynamics and SharePoint

Gas Safe Consultants needed a solution that would centralise information, simplify day-to-day tasks and reduce data storage costs, without overwhelming users. Synergy Technology recommended enhancing Dynamics with SharePoint integration so that all key documents and customer information could be accessed from one place, while larger files were stored cost-effectively outside the CRM, which wouldn't use up the more expensive storage space in Dynamics. After some discussion, Synergy Account manager, Matthew Lamb came to Fiona with a mapped-out solution. "Matt came to me and said 'we've got this, I think it would work really well for your company.' I feel we've got a really good working relationship with Synergy, Matt especially, he understands how we work and what our needs are as a company."

Synergy's CRM team designed a tailored setup inside Dynamics, adding tabs for accounts, training and files so that every customer record now presents a complete picture. "All our customer files are integrated, but without using lots more data in Dynamics. All of that information has gone onto SharePoint, so instead of going in and out to lots of spreadsheets, we're moving forward to integrating it all into CRM."

Because change management was critical, Fiona explains that usability was a key design requirement. "We've got a really good team here, but we needed a solution that was user friendly and easy to implement to ensure that they didn't revert to previous practices."



Implementation, Training and Support

Synergy Technology followed a structured, low-stress implementation approach that guided Gas Safe Consultants through every stage. "First of all, we had a meeting with Matt. He explained the solution to me and how it would work in our business. Then he talked me through it with John (CRM Support) to tell us how it would be implemented by his team. After they did all the work on it, a colleague and I had a meeting where they showed us how it worked. Finally, there was training for the whole team after it had been implemented. Becky (CRM consultant) trained us and then we've had ongoing support from John and the rest of the Synergy team."

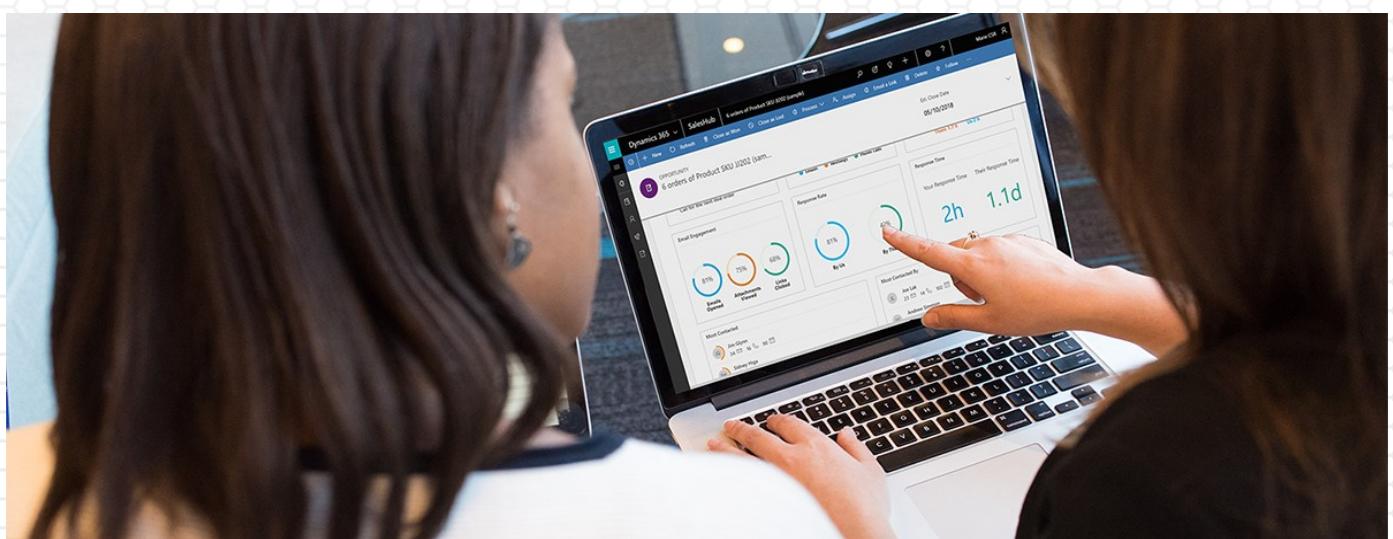
Responsive, friendly support has been a major differentiator. "The support from John has been absolutely brilliant. He comes back to us as soon as he possibly can, and it's normally within 10-15 minutes. Anything we've come back with, he's replied straight away with how we do it. He's also sent emails with a solution on it that we can forward to everybody." Training was delivered in clear, accessible language so the whole team could adopt the new way of working with confidence. "The training that Becky gives us is great as well, she doesn't speak to us like we don't know anything about IT. She speaks to us in a really clear and straightforward way. So the support and the training that we get, I think is really valuable."



The Results: Improved Efficiency

The new Dynamics and SharePoint setup has transformed how Gas Safe Consultants' team access and use information. "There were some teething issues with the new process obviously, but it's a nice process, and it's been easy enough for everyone to pick up." Fiona explains how Finance in particular now works far more efficiently. "Once we've done our training, we get a delegate list and they invoice from the delegate list because this tells us how many people actually went to the training. Previously, they would have to check three different places for this information. Now, everything is in one place, so for finance this is a godsend, they can just go straight into the right record."

Centralising documents and records has eliminated the need to hunt through spreadsheets and paper files, reducing errors and saving time for every member of the team. The move to SharePoint-backed document storage has also helped control data usage in Dynamics, cutting ongoing storage costs. As Fiona puts it "It's time-saving, it's energy efficient, and of course, it's saving us the cost of data as well, as it's all stored in SharePoint. It just makes complete and utter sense."

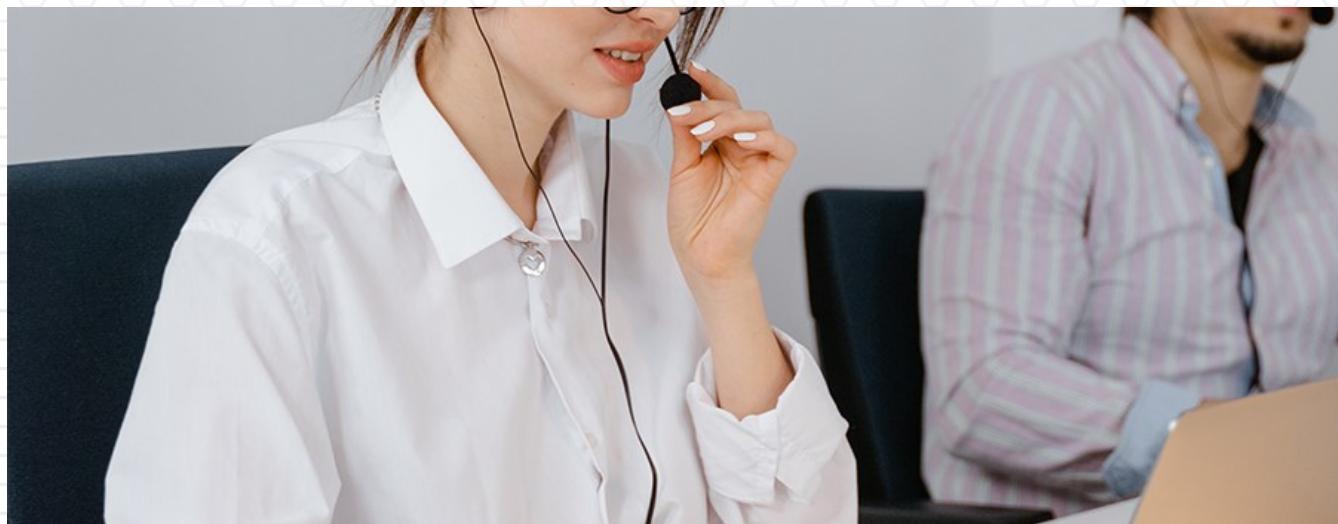


The Future

With the core integration in place and early benefits already visible, Fiona is focused on building further on this foundation. "It will continue getting easier going forward in the future. Our training takes place every two years. So two years down the line, we'll just be going back into one file looking at what they had and looking who was there. It's going to be so much easier than going in and out of all these different files and spreadsheets."

Adoption is already strong among the team "I wanted to introduce this part first, because once everybody sees the benefit of it they start to trust the system. We're a week in, and they're all starting to see the benefit of it being in one place already."

The roadmap with Synergy Technology includes deeper integration and smarter use of Dynamics for sales and finance. "We've got lots of projects down the line. Eventually we'd like to link the software we use for finance, so again, it's all in one place." "What Matt and I are also looking at is the opportunities for sales, so that again it's in one place, there's not nipping back to the customer file to see if somebody's been in contact with them."



For Fiona, the relationship with Synergy is built on trust, transparency and practical, down-to-earth advice. She values the fact that recommendations are always framed around business outcomes rather than sales targets: "I don't ever feel that when Matt brings something to me, he is just trying to sell our company something. I feel like when he comes to me with something, he's coming with a solution that he knows would benefit our company. Sometimes we go for it and sometimes we put a hold on it, but I don't feel that he's ever just trying to sell us something. I always feel that he's trying to come up with a solution for us."

That partnership ethos is reinforced by the way the wider team are treated in day-to-day interactions. Fiona and her colleagues want a partner who respects their time, communicates clearly and recognises that IT is there to support the business, not the other way round. As she explains "We have changed suppliers in the past because we didn't like the way they talked to us. We're a customer, we shouldn't ever be treated like we are an inconvenience, and I don't feel we ever get that from Synergy."



Preston Office

Wyre House
Nateby Technology Park
Cartmell Lane
Nateby
Preston PR3 0LU
Tel: 0345 456 0050

Cambridge Office

1010
Cambourne Business Park
Cambourne Road
Cambourne, Cambridge
CB23 6DW
Tel: 0345 456 0050

Manchester Office

Marsland House
Marsland Road
Sale
Manchester
M33 3AQ
Tel: 0345 456 0050

Melbourne Office

Level 10
440 Collins Street
Melbourne
VIC 3000
Australia
Tel: +61 370 038 082

Leeds Office

Batley Technology Park
Grange Road
Batley
West Yorkshire
WF17 6ER
Tel: 0345 456 0050



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