



ClientWindow

## CASE STUDY

**ClientWindow** is a communication platform that helps professional services firms connect with clients who prefer messaging apps like WhatsApp, while maintaining workflows in tools like Microsoft Teams and email. The platform enables message routing, compliance, and visibility across teams – helping firms modernise client communications without losing control.



*"We engaged G7 to help ClientWindow build our presence in the UK accounting tech space, and it proved to be a great decision. Andy has a fantastic network and personal brand in the sector, and his expertise in sales and partnership development was clear from day one. He attacked every project with intent - whether it was building our sales playbook, supporting key industry events, or opening doors to valuable strategic partners. Andy balances strategic thinking with hands-on delivery, and his work laid solid foundations for our next phase of growth.."*

**DAN CATTERMOLE**

Co-Founder - ClientWindow

### CHALLENGE

As a fast-moving technology company, **ClientWindow** was looking to deepen its understanding of the UK accounting and accounting-tech landscape. They wanted to increase visibility in the ecosystem, build trust with the right partners, and lay the groundwork for a scalable sales function – all while staying lean.

### SOLUTION

**G7** provided a blend of strategic and hands-on support across three key work-streams:

#### Sales Enablement Foundations

- Defined Sales roles, including salary benchmarking.
- Sourced a CRM consultant and scoped implementation requirements.
- Authored a tailored Sales Playbook with clear messaging and sales processes.

#### Partnership Development

- Introduced ClientWindow to key vendors, industry bodies, and networks.
- Unlocked opportunities for webinars and event sponsorships.
- Opened doors to strategic conversations across the accounting tech ecosystem.

#### Market Visibility & Ecosystem Positioning

- Supported presence at flagship events including DAS and Accountex.
- Identified webinar and podcast opportunities to drive awareness.
- Advised on messaging to support GTM alignment and investor readiness.

### IMPACT

ClientWindow gained a stronger foothold in the UK accounting sector, increased brand visibility, and formed key industry partnerships. With a clear sales foundation and a growing network of aligned partners, the business is now better positioned to scale commercial activity with clarity and confidence.