

## Success Story

# CSOLS IS ABLE TO HANDLE INCREASED SUPPORT CALLS WHILST KEEPING THE SAME AMOUNT OF STAFF

Workbooks has allowed CSols to act on support queries much faster and has improved visibility across the entire organisation.



“ONE OF THE MAIN BENEFITS FOR US IS THAT WE HAVE BEEN ABLE TO DISTIL PROCESSES AND KNOWLEDGE INTO WORKBOOKS, WHICH CAN BE SHARED WITH THE WHOLE TEAM.”

Kevin Jones - Sales Manager at CSols Ltd

## INTRO

CSols Ltd is a laboratory informatics company that provides analytical laboratories with software solutions to streamline their laboratory procedures and enable them to integrate the hydrogenous mix of equipment that they use to meet their specific testing needs.

The company was founded in 1990 by Dr Phil Goddard, a scientist with expertise in the scientific instrument business, who realised that a common pain point amongst laboratories is the difficulty associated with transferring data between the different pieces of equipment that they use during testing without manual transcription or reams of paper.

With a team of specialist employees with working expertise in their niche area, the company offers a unique combination of industry knowledge and specially developed software packages.



FASTER SUPPORT



IMPROVED COMMUNICATION



BETTER CUSTOMER SERVICE

## A LOOSELY CONNECTED BUSINESS

The sales and marketing team at CSols Ltd had purchased several copies of Sage Act! to fulfil their CRM needs. However, when Kevin Jones joined the company as Sales Manager, he found that the copies of Act! were loosely connected and vital customer information was commonly stored in files on a shared server or, worse still, was held in people's heads and in personal folders.

Kevin explains, "Sage Act! was very limited in terms of functionality and it simply wasn't being used by the other members of the team. Each employee had their own copies of vital information, such as order information, customer contracts and contact details, and everybody had their own way of recording information about a customer."

**"A LOT OF DATA WAS BEING KEPT IN PEOPLE HEAD'S OR IN PERSONAL FILES. THIS MADE US FEEL VULNERABLE AS A BUSINESS AND IT BECAME CLEAR THAT ACT! WASN'T ADEQUATE AS A LONG TERM SOLUTION AND IT WASN'T SCALABLE."**

**Kevin Jones** - Sales Manager at CSols Ltd

## A SCATTERED SUPPORT TEAM

An important share of the company's income is generated through support activities and it is a vital part of the business to ensure they remain happy with the products they use.

Given the unique nature of the services that CSols Ltd provides, customers do not go anywhere else with support queries and questions. The company's support team members are scattered across the country but prior to implementing Workbooks had no real mechanism of formally recording and monitoring all this support activity.

Kevin explains, "If we had tried to continue using ACT! it would have been very difficult. We found that syncing between multiple copies of ACT! was time consuming and didn't always work so it would have been troublesome trying to facilitate data sharing with employees all around the UK."

Kevin continued, "Besides, ACT! offered no facilities aside from address information to help our support team. It was important for us to move to a purely cloud-based CRM solution as we needed a shared database that could be accessed by all our staff regardless of their location or time of day."

## FILLING THE MIDDLE GROUND

CSols Ltd also needed a system that could fill the 'middle-ground' between sales, customer contracts, invoicing and customer support. Kevin explains, "ACT! was not able to give the whole company visibility of every customer interaction and the different elements of the customer journey. The ability for the whole team to see contract information, customer invoices, supplier orders and support cases was critical for our business."

## WORKBOOKS: THE BREADTH AND CAPABILITY NEEDED

Kevin was instantly attracted to Workbooks because he felt that the solution could offer CSols Ltd the breadth of functionality required to fulfil all the company's needs. He explains, "Workbooks offered a solution that would not only resolve the data sharing problems within the sales and marketing teams but also the functionality to generate quotes, supplier orders and invoices from a single, fully integrated system. If we continued with ACT! or moved to Salesforce.com, neither system offered the breadth and capability that Workbooks already had as standard without significant changes and associated costs."

## DISTILLING KNOWLEDGE INTO A CENTRAL SYSTEM

Using Workbooks, CSols Ltd has been able to document the wealth of the knowledge and information held by the team into one central system.

Kevin explains, "One of the main benefits for us is that we have been able to distil processes and knowledge into Workbooks which can now be shared with the whole team. For instance, previously ordering third party equipment or services for customer projects was done by one person and if he wasn't in the office, then it didn't get done, whereas now it can be done by anyone."

**"IT'S REASSURING AS A MANAGER TO KNOW THAT ALL OF THE TEAM HAVE ONE PLACE TO BOTH RECORD INFORMATION AND FIND INFORMATION. IT IS NO LONGER STORED IN PEOPLE'S HEADS OR ON INDIVIDUAL SYSTEMS AND THIS HAS MADE THE WHOLE TEAM FAR MORE EFFICIENT."**

**Kevin Jones** - Sales Manager at CSols Ltd

## RECORDING ALL ACTIVITY

CSols Ltd has extended the opportunity feature to help track not only sales leads, but also completed implementation and invoicing, giving them an accurate record of all company activity.

## KEEPING CUSTOMERS INFORMED

CSols Ltd regularly send their customer base newsletters using the Workbooks mailshot feature in combination with reports that segment customers by type and industry.

## SUPPORT CASE MANAGEMENT

Since implementing Workbooks, the support team now follow a routine procedure and record all support activity in a single place that can easily be traced and monitored by the rest of the company. Kevin explains: "When a support query comes in via the hotline number or the support email address, a case is created in Workbooks. We can assign a 'type' to the case which helps the team to prioritise the query and identify which product the issue relates to, which customer it relates to and which area it is in."

"The great thing is that this also allows us to report back on where we need to improve or where there are common faults," says Kevin, "We can easily share and hand over support cases between the team, link cases to active contracts and the support manager can easily monitor case type and frequency." Kevin continued: "Workbooks has helped us to provide better support and has empowered the support team to act on a support query much quicker. We now take many more support calls than we did a year ago and yet we have the same number of staff."

## A CRM SYSTEM THAT IS CONSTANTLY EVOLVING

As CSols Ltd continues to grow and evolve as a company, they like the fact that the CRM solution they are using is regularly enhanced via a number of updates throughout the year. Workbooks updates their CRM system based on user feedback and user ideas for new features or functionality that are posted in the Community section of their website.

**"ONE THING THAT WE REALLY LIKE ABOUT WORKBOOKS IS THAT THERE IS A REGULAR SET OF UPDATES. IT IS VERY REASSURING AS A USER TO SEE THAT THE PRODUCT IS CONSTANTLY BEING DEVELOPED AND NEW FEATURES OR FUNCTIONALITY IS BEING ADDED ON A REGULAR BASIS."**

**Kevin Jones** - Sales Manager at CSols Ltd

## About

### INDUSTRY

IT & Telco

### NUMBER OF EMPLOYEES

11-50

### IMPLEMENTATION DATE

August 2010

### TECHNOLOGY

- Workbooks Business

## Contact Workbooks

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