

Success Story

INFORMATION SHARING BETWEEN DEPARTMENTS IS QUICKER, EASIER AND MORE EFFECTIVE

Workbooks CRM provides a 360 degree view of a customer and a detailed view of the entire sales cycle.



aspin

“SINCE IMPLEMENTING WORKBOOKS CRM, WE HAVE A UNITED SYSTEM TO MANAGE OUR SALES PROCESS, FROM PROSPECT TO CASH.”

Nathan Aspin - Managing Director, Aspin

INTRO

Since 1984 Aspin have been developing, implementing and supporting sales order processing apps for distributors.

Aspin's user friendly applications allow sales teams, agents, and retailers to place and process orders whether they are on-the road, at trade shows or online. Their applications include the PixSell iPad app for sales reps to take field based orders, and their InterSell B2B eCommerce websites for retail customers to place orders 24/7, optimising every sales opportunity.



MANAGE THE FULL 'PROSPECT TO CASH' PROCESS



360 DEGREE VIEW OF A CUSTOMER



IMPROVE OPERATIONS

INFORMATION SILOS

Prior to Workbooks, Aspin were using multiple systems to gather information. Although these databases harnessed all of the information Aspin required they were maintained by different departments. They had separate databases for customers, prospects and jobs - giving limited visibility across the organisation. They wanted a solution that connected all of this information to give a 360 degree view of a customer.

“WE WANTED A SYSTEM THAT COULD PROVIDE A HOLISTIC VIEW OF OUR INTERACTIONS WITH A CUSTOMER INCLUDING NOTES, ACTIVITIES, MEETINGS, MARKETING, QUOTES, ORDERS AND INVOICING. WE LOOKED FOR A WEB-BASED SOLUTION SO THAT STAFF CAN SEE ALL CUSTOMER INTERACTIONS WHETHER THEY ARE IN THE OFFICE OR ON THE ROAD.”

Nathan Aspin - Managing Director at Aspin

DRIVING THE SYSTEM OURSELVES

Aspin enquired about Workbooks after they received a CRM requirements gathering checklist put together by Workbooks. This checklist helps organisations to prioritise their CRM requirements in relation to Sales, Marketing, Customer Support, Order Processing, Integrations and Implementation. It allowed Aspin to see how the CRM platform could impact different areas of their business.

Aspin looked at a number of CRM providers including Salesforce, Zoho, and Autotask and quickly selected Workbooks. They wanted to utilise their in-house expertise to drive as much of the project themselves as possible.

The Workbooks delivery team worked alongside Aspin to ensure implementation was a success, providing advice and end-user training.

“WORKBOOKS OFFERED MORE FLEXIBILITY OUT-OF-THE-BOX. THE EASY TO USE INTERFACE MEANT THAT WE COULD DRIVE THE SYSTEM OURSELVES AND CUSTOMISE IT ON AN ON-GOING BASIS. I WAS KEEN TO UTILISE THE SKILLS WE HAVE IN-HOUSE TO CARRY OUT A LOT OF THE IMPLEMENTATION, BUT IT WAS GREAT TO KNOW THE WORKBOOKS TEAM WOULD BE THERE TO SUPPORT US.”

Nathan Aspin - Managing Director at Aspin

About

SUCCESS – A UNITED VIEW

Aspin are using Workbooks CRM for:

- Recording all sales related activities
- Maintaining customer and prospect records
- Recording support cases
- Driving project opportunities
- Driving quotations through to acceptance
- Tracking sales leads imported from the website
- Maintaining marketing campaigns
- Providing management with key business metrics from automated reports

Aspin have utilised integrations between Workbooks and Outlook, Dotmailer and their bespoke accounts software to see all of their customer interactions in one place. Aspin now have all of the information they want in one central location. The easy to use interface means they can continue to modify their CRM to meet their growing business needs. They have achieved their goal of utilising their inhouse expertise to shape their platform, knowing Workbooks are there to support them on their CRM journey.

“SINCE IMPLEMENTING WORKBOOKS WE NOW HAVE A UNITED SYSTEM TO MANAGE OUR SALES PROCESS FROM PROSPECT TO CASH. INFORMATION SHARING BETWEEN DEPARTMENTS IS QUICKER, EASIER AND MORE EFFECTIVE.”

Nathan Aspin - Managing Director at Aspin

INDUSTRY

IT & Telco

IMPLEMENTATION DATE

June 2014

NUMBER OF EMPLOYEES

11-50

TECHNOLOGY

- Workbooks CRM
- Outlook Connector
- Audit

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