

Success Story

WORKBOOKS HELPS CLINKCLINK CREATE MORE BUSINESS THROUGH BETTER DATA MANAGEMENT

After integrating Workbooks CRM, ClinkClink spend less time on admin whilst anticipating an uplift in business



“WORKBOOKS ENABLES STAFF TO WORK THROUGH THE SALES PROCESS MORE EFFICIENTLY, FROM THE INITIAL SALES LEAD ALL THE WAY TO THE FINAL INVOICE.”

Gary Jordan - Operations Manager at ClinkClink Ltd

INTRO

ClinkClink Ltd is a leading events management company that specialises in the delivery of live events, brand experiences and event bars.

Established in 1998, the company initially focused on event bars but it has now evolved to provide a wide range of specialist services including award ceremonies, conferences, exhibitions, roadshows and product launches.



LESS TIME SPENT ON ADMIN



REDUCED DATA SILOS



MORE STREAMLINED PROCESSES

REDUCING SILOS OF INFORMATION

At ClinkClink Ltd, there are a number of business processes that underpin each event that they manage; lead and opportunity conversion, customer quotations and orders, and accurate job costing to ensure profitability of the work.

Initially, the staff at ClinkClink Ltd were using spreadsheets to manage and monitor these processes. Job folders were stored on the company servers containing all the information relating to a particular job.

These folders contained separate engineered spreadsheets for customer quotes, customer orders and supplier orders. In addition a separate spreadsheet on the server was used to log 'Profit & Loss' and all contacts were stored in Outlook.

Gary Jordan, Operations Manager at ClinkClink Ltd explained, "This system caused a number of problems for us. It resulted in data replication from spreadsheet-to-spreadsheet and inaccuracy as human error led to incorrect figures being created.

In addition, using a network of folders and spreadsheets made it difficult to search, reference or link data, and using Outlook as a means of storing company contacts proved to be unorganised, and again, not easily searchable. Overall the system was over-complicated and inefficient."

"WE QUICKLY REALISED THAT WE NEEDED TO IMPLEMENT A SYSTEM THAT COULD ACT AS A JOB DATABASE, PROVIDING A SIMPLE WAY OF STORING AND REFERENCING JOBS."

Gary Jordan - Operations Manager at ClinkClink Ltd

WHY WORKBOOKS

ClinkClink Ltd conducted a detailed search of many CRM systems and found Workbooks via a Google search.

Gary explains, “We had a very specific list of CRM requirements. We were looking for a system that would centralise our data, enable us to easily view and monitor our pipeline and facilitate accurate cashflow forecasting.”

Gary continued, “It was also important that the solution included an Outlook and Sage Integration so we could pull data from our accounting and email systems into our CRM system. And finally, we wanted a system that enabled marketing campaign management, asset management and supported a product database. Workbooks ticked all of these boxes, whilst the other CRM vendors that we looked at didn't.”

Gary went on to say, “Having a cloud-based product wasn't initially important to us and hadn't crossed our minds until we first spoke to the Workbooks team. However, we were drawn to the fact that it would make the system more accessible and it removed the stress of being responsible for inhouse IT upkeep and upgrades.”

EASY TO IMPLEMENT

Workbooks has been designed to be easy to implement and this meant ClinkClink Ltd were able to do some of the implementation work themselves.

Gary attended a training course and afterwards he was able to work alongside the Workbooks implementation team to customise Workbooks to meet ClinkClink Ltd's individual needs.

“The training was informal and at a good pace so I was able to draw all of the relevant information from it. Implementation was easy due to myself and the technicians working together to personalise the Workbooks system to suit our company,” says Gary.

“IT WAS ALWAYS GOING TO BE A STRUGGLE TO GET EVERYBODY TO CHANGE THEIR WORKING PROCESSES BUT I AM GETTING MORE AND MORE POSITIVE COMMENTS AS THEY GET FULLY IMMERSSED INTO IT. I HAVE ALSO HAD GREAT FEEDBACK ABOUT IMPROVEMENTS AND DUE TO THE EASY CUSTOMISATION I HAVE BEEN ABLE TO ADAPT THE SYSTEM TO IMPLEMENT THESE IMPROVEMENTS.”

Gary Jordan - Operations Manager at ClinkClink Ltd

WORKBOOKS: CONNECTING A DISJOINTED PROCESS

ClinkClink Ltd is now using Workbooks as a central database for all of their contacts.

Workbooks acts as a tool to enable staff to work through the sales process more efficiently, from the initial sales lead, through to the job opportunity, the quotation, customer order, supplier orders and the final invoice.

“Having a centralised system that contains all of this information has allowed us to create reports for Profit & Loss and overview purposes.

It also allows staff to easily access job information from one place, saving time searching through emails and job folders, and making job processes more streamlined.” says Gary.

“A CENTRALISED SYSTEM ALLOWS STAFF TO EASILY ACCESS INFORMATION FROM ONE PLACE, SAVING TIME SEARCHING THROUGH EMAILS AND JOB FOLDERS MAKING JOB PROCESSES MORE STREAMLINED.”

Gary Jordan - Operations Manager at ClinkClink Ltd

About

INDUSTRY

Marketing & Event Management

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

January 2016

TECHNOLOGY

- Workbooks CRM

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