

## Success Story

# WORKBOOKS DRIVES EFFICIENCIES AND PROVIDES GREATER VISIBILITY INTO IFIS COMMERCIAL OPERATIONS

Workbooks CRM has become an integral part of the way IFIS operates.



“WORKBOOKS MAKES LIFE EASIER FOR EVERYONE AT IFIS. WE HAVE FEWER MANUAL PROCESSES, WHICH NOT ONLY REDUCES THE POTENTIAL FOR ERRORS BUT ALSO SAVES US SIGNIFICANT AMOUNTS OF TIME.”

Maria Severino - Head of Finance

## INTRO

Established in 1968, IFIS is a leading international provider of food and health information. Researchers, industry practitioners and students around the world rely on its database, FSTA® – Food Science and Technology Abstracts, to keep up to date with new developments in food and nutrition.

These customers include more than 1000 academic institutions and commercial organisations such as Nestle and Dupont. To reach these customers globally IFIS works with vendors and partners based in the US and Germany.

IFIS partners with vendors such as EBSCO, ProQuest, Thomson Reuters (now know as Clarivate), and Wolters Kluwer. It is a not-for-profit publisher and is committed to improving knowledge on food and health matters in developing countries. It aims to achieve this by offering researchers in developing countries access to its information through the Research4Life programmes, HINARI and AGORA.



IMPROVED FINANCIAL PROCESSES



OPERATIONAL EFFICIENCY



IMPROVED DECISION MAKING

## ISSUES FOR FINANCE AND SALES

Continued growth was bringing challenges to IFIS. By 2011, Head of Finance, Maria Severino, was convinced it needed to invest in a CRM system. “We had developed a system in-house to record sales information”, she explains. “It held more than 87,000 records, but was not delivering for either sales or finance.”

For her team in finance, the key issues were that the system lacked the functionality required to operate across multiple currencies, and it did not integrate with Sage. Keeping data in separate sales and finance silos led to duplication, and meant that reconciling the two was a time-consuming and error-prone process.

At the same time, a new Sales Manager joined the organisation. “He was not happy with the system,” recalls Severino. “He was not able to track tasks, leads or opportunities, and the reports it produced lacked the clear view he needed of processes, sales opportunities, and so on.”

## A TOOL TO EMPOWER

The organisation decided to investigate commercial CRM solutions. Over several months a team involving IT, sales, marketing and finance scoped out requirements and reviewed a range of providers including Sage CRM, Salesforce and Workbooks. Severino explains why they chose Workbooks.

**“IN SIMPLE TERMS IT GAVE US ALL THE FUNCTIONALITY WE NEEDED, WAS EASY TO SET UP AND INTUITIVE TO USE. WE WOULD BE ABLE TO LOG AND TRACK OPPORTUNITIES AND CONTRACTS, ASSIGN TASKS AND SO ON, AND IT WOULD AUTOMATICALLY CAPTURE ALL OUR OUTLOOK COMMUNICATION, LINKING IT TO RECORDS IN WORKBOOKS. IT WOULD BE EASY TO IMPORT AND EXPORT DATA, AND THE TEAM WAS KEEN ON THE WINDOWS STYLE DESKTOP, AS WELL AS THE STRAIGHTFORWARD, INTUITIVE LOOK AND FEEL OF THE SOFTWARE.”**



**Maria Severino** - Head of Finance

The IFIS team was confident that Workbooks would be a tool to empower its sales team, one that would fit into its existing way of working and so have a high adoption rate. It would drive efficiencies, and provide greater internal visibility of the activities and successes of the commercial function.

## RAPID ADOPTION

IFIS was able to manage the majority of the implementation itself but had the Workbooks team on hand for any support it needed. Severino reports that the greatest challenge was the initial data cleansing. “We had accumulated more than ten years of data that needed to be migrated to Workbooks,” she explains.

The charity ran the legacy and Workbooks systems in parallel for a couple of months to test out the new set-up. Once the team was confident everything was working as it should, they dropped the legacy system.

“We’d already gained widespread buy-in during the selection process, so we had a quick take-up from users,” says Severino. “All departments from senior management downwards got involved early on. From our perspective in finance, we were very keen to ensure it worked across multiple currencies so we worked very closely with the Workbooks consultants to ensure the system supported our international business as intended.”

## WIDESPREAD USE

Workbooks is now used widely across IFIS. From the sales function using it to manage relationships with vendors, track opportunities and keep customer records, the marketing function using it to monitor its campaigns and adapt future ones where necessary to the finance team using it to manage contracts, process orders, invoices and manage renewals. From the perspective of the MD and other senior managers using it to analyse business performance, Workbooks has become an integral part of the way the organisation operates.

Severino reports that the integration with Sage is seamless. “We track opportunities, manage contracts and raise invoices in Workbooks,” she explains. “Invoice information is then automatically transferred to Sage, where we record payments, and this information is automatically updated in Sage. This means we can quickly and easily produce accurate, up-to-date monthly debtors’ reports, and so chase unpaid debts.”

**“IT IS NOT ONLY THE FINANCE TEAM THAT HAS BENEFITTED. WORKBOOKS MAKES LIFE EASIER FOR EVERYONE AT IFIS. WE HAVE FEWER MANUAL PROCESSES, WHICH NOT ONLY REDUCES THE POTENTIAL FOR ERRORS BUT ALSO SAVES US SIGNIFICANT AMOUNTS OF TIME. WE HAVE A FAR CLEARER VIEW OF OUR SALES PIPELINE AND OF AREAS OF OUR SALES PROCESS WHERE WE CAN IMPROVE. WE HAVE A HOLISTIC, SINGLE, AND ACCURATE VIEW OF OUR CUSTOMERS. WE CAN ALSO INTERROGATE OUR CUSTOMER DATA TO INFORM AND ENHANCE OUR DECISION-MAKING.”**

**Maria Severino** - Head of Finance

## A CRM JOURNEY

IFIS has further plans for its Workbooks CRM system. Most immediately, it is about to launch a new food labelling service, ESCALEX, which it will be taking to market directly, rather than through vendors. The team plans to use Workbooks to manage the full commercial process, from marketing campaign to lead generation, sales development and then invoicing and payment tracking.

As Severino concludes: "CRM is a journey, and our journey with Workbooks has begun well. In the months and years ahead we'll be finding new ways to use the system, and gain even greater benefits from it."

## About

### INDUSTRY

Media and Publishing

### NUMBER OF EMPLOYEES

1-50

### IMPLEMENTATION DATE

July 2011

### TECHNOLOGY

- Workbooks Business
- Outlook Connector

## Contact Workbooks

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