

## Success Story

# WORKBOOKS CRM HELPS K3 RETAIL DRIVE CUSTOMER SATISFACTION

Enhanced transparency through more effective customer service has led to more long-term relationships.



**“WE BENEFIT FROM WORKBOOKS IN ALL OUR CUSTOMER FACING FUNCTIONS AND RECOVER THE COST OF OUR SUBSCRIPTION THROUGH IMPROVEMENTS IN OUR ORDER MANAGEMENT ALONE.”**

Jane Thomas - K3 Retail

## INTRO

Since 1984 Retail Systems Group has been at the forefront of design, supply and support of business management systems for small and mid-sized retailers. The company was acquired in 2011 by K3 Retail. Today the company is based in Coleshill, West Midlands, and K3 has offices in Manchester, and the Netherlands with the head office in Didcot. 30 people are employed by the Coleshill office, which specialises in provision of EPoS, ECommerce and Stock Management solutions to retailers mainly in the UK and Republic of Ireland.

Customers such as Roman Originals, Cadbury World, and English Heritage, as well as various museums and garden centres all benefit from the firm's experience and expertise. Its market-leading computer systems, till, back office, stock control and management solutions, are supported by a customer service function which is open 9am-7pm, seven days a week.



**IMPROVE OPERATIONAL EFFICIENCY & AUTOMATE PROCESSES**



**BETTER DECISION MAKING**



**DRIVE CUSTOMER SATISFACTION**

## SELECTING A SOLUTION

With around 1500 customers to support across the country, the team handles around 50 cases a day where the technology on-site is not working quite as it should and K3 may need to get an engineer out to fix the problem. Initial calls or support requests are logged at Coleshill and then allocated if necessary to engineers who are based in locations across the UK.

Those cases need to be tracked through to resolution, with notes detailing customer contact and engineer actions, and activities scheduled for agents and engineers. K3 had taken the decision to look for a new solution because its existing support system – Sunrise – was too restrictive, and the upgrade available from that provider did not offer the functionality or the price they wanted.

**“WE REVIEWED VARIOUS CRM SYSTEMS AND DECIDED TO GO WITH WORKBOOKS. IT PROVIDED THE FUNCTIONALITIES WE WANTED, WAS GOOD VALUE FOR MONEY, AND WOULD BE EASY FOR THE TEAM TO USE.”**

**Jane Thomas** - Systems Support at K3 Retail

## IMPLEMENTATION

K3 Retail went live with Workbooks CRM edition with Outlook Connector and the Contract Management Module in March 2014. There are 19 users in the helpdesk team and they use it every day.

Thomas led the implementation, which involved a one-day scoping exercise, where Workbooks gained a clear picture of K3's needs, and both teams discussed the best way to deliver those outcomes. From there K3 was able to implement it themselves, only needing minimal telephone support from workbooks.

Thomas says: “We designed our screens so the help desk would be able to see what they needed to when they needed to, and then we simply imported our data and customer records from Sunrise into Workbooks. It was all pretty straight forward and we got running in no time.”

## BENEFITS

Among the benefits of this implementation has been the automation. Thomas says: "Our system now looks out for certain actions being completed and knows to automatically close a case at that point. This and other automations have reduced the administrative burden. It is allowing our agents to focus on resolving customer issues and driving customer satisfaction."

K3's Workbooks solution includes the Contract Management Module. This means that when a customer calls, agents can check that this particular customer still has a valid support contract before addressing the issue. In the past they would have had to check such information by finding the relevant contract in a filing cabinet; now they make one click and they can instantly view the up-to-date customer's service agreement and status. This saves agent time and also provides a smoother service to K3's customers.

However, the most significant benefits have come from the enhanced reporting capabilities the Workbooks solution provides. Thomas says: "We get information on the volume of queries we are receiving and on how effectively we're handling those queries. This information allows us to constantly see how we can improve our operational efficiency. We can review workloads, performance and much more, enabling us to make more informed decisions."

**"THE REPORTS WE GET FROM WORKBOOKS ALSO MAKES INFORMATION SHARING BETWEEN DEPARTMENTS FAR MORE EFFICIENT. FOR EXAMPLE, THE ACCOUNTS DEPARTMENT CAN CHECK HOW MANY CALLS A CUSTOMER HAS LOGGED IN THE CURRENT FINANCIAL YEAR AND THEN COMPARE THAT WITH CONTRACTS AND BILLING STATUS. SIMILARLY, WE CAN NOW PROVIDE THIS INFORMATION TO THE CUSTOMERS THEMSELVES. THIS TRANSPARENCY AND OPENNESS FOSTERS TRUST, DRIVES CUSTOMER SATISFACTION, AND LEADS TO LONG-TERM STRONG RELATIONSHIPS."**

**Jane Thomas** - Systems Support at K3 Retail

## FUTURE DEVELOPMENTS

Thomas concludes that adoption and satisfaction is good amongst the team, and that the company is keen to develop its usage of Workbooks further. "We want to use more of the automation functionality," she says. "Everyone here is excited by the potential of what it could do, and we're even getting other departments asking us how they could use it. That's another area we'll definitely be looking at in the future."

## About

### INDUSTRY

IT Services

### NUMBER OF EMPLOYEES

251-500

### IMPLEMENTATION DATE

March 2014

### TECHNOLOGY

- Workbooks CRM
- Contract Management
- Outlook Connector

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