

Success Story

NATIONAL FEDERATION OF BUILDERS NOW HAVE A HOLISTIC PICTURE OF THEIR SALES CYCLE

After a successful implementation of Workbooks CRM, NFB can track the ROI of marketing and their management can quickly review what's happening in any sales cycle.



“I REALLY FELT THAT WORKBOOKS UNDERSTOOD THE PROCESS. THEY COMMUNICATED WITH US AT EVERY STAGE AND THE METHODOLOGY THEY USED MADE SENSE TO ME. THEIR IMPLEMENTATION TECHNIQUE WAS IMPRESSIVE.”

Trevor MacDonald - Business Information Manager at NFB

INTRO

The National Federation of Builders (NFB) is an independent membership organisation backed by over 150 years of experience and provides business and policy support to builders, contractors and house builders across England and Wales.

For companies involved in the building and construction industry the NFB provides vital resources in key areas, helps members to win work and saves them time and money so that they can focus on their primary task – construction.



HOLISTIC PICTURE OF SALES CYCLE



MARKETING CAN TRACK ROI



UP-TO-DATE MANAGEMENT REPORTS

THE CHALLENGE

NFB had a membership database in place since 2006 but they found this wasn't delivering the functionality required to drive revenues by acquiring new members. They were loading lists of new building companies into their membership database but with legal requirements to remove data after certain amounts of time the process soon became complicated and time consuming.

So new prospect information was held in spreadsheets to manage the sales process. However, as there are many people in the team they ended up with multiple spreadsheets, it soon became hard to see the latest version and who changed what and when.

This made it difficult for management to track the new membership pipeline, drive cost reductions and boost membership numbers. NFB's Sales and Marketing teams use a variety of means to communicate with members and prospects including calls, meetings, email campaigns, roadshows and events. Managing data from different spreadsheets hindered NFBs campaign effectiveness and reporting on historical sales became challenging.

NFB wanted a full picture of what was taking place with their sales pipeline and to get management the reporting they needed on a monthly basis. They wanted to move away from the fragmented approach that spreadsheets presented and implement a long term solution.

FACILITATING CASE MANAGEMENT

NFB went out to market with their requirements and shortlisted 5 CRM providers including Salesforce.com and Workbooks.com. They outlined all of their needs and gave each vendor the opportunity to present their solution. NFB took up references with these providers, looked at the pros and cons of each and decided on Workbooks.com.

Trevor McDonald, Business Information Manager commented: "Other suppliers were more interested in our membership database. We found we had to keep focusing the suppliers back to our current requirements – managing our prospect data and the sales cycle. Workbooks.com really understood our needs from the beginning. We really felt they listened, and as we wanted a long term solution this gave us the confidence that they would work in partnership with us. Their great customer references made us feel even more positive that they could fulfil our needs."

Workbooks.com went through all of NFBs requirements and talked through what the implementation would involve. There were different stages including requirements gathering, the initial build, testing, training, roll-out and user acceptance support.

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THE BIG PICTURE

NFB now have a holistic picture of their sales cycle:

- Marketing can track their leads and campaign ROI and work to improve member prospecting and retention, driving revenues.
- Sales can track their pipeline and manage their day to day activities.
- NFB are now using Workbooks.com to track their training courses as now they can capture the requirements of their non-members, something which spreadsheets did not provide.
- Management can look at their Workbooks.com reports to get an accurate up to date picture of what is happening in the sales cycle.

THE NEXT PHASE

NFB can now report on all of the different sales stages, with spreadsheets this was extremely difficult. NFB are now looking forward to building on their use of Workbooks.com to streamline their processes even further and drive membership numbers.

Trevor commented: "As time goes by we will make even greater use of the system and more reporting as and when we need it. We have developed initial reports which are really good but we are aware that the system is capable of a lot more."

NFB have arranged to have regular focus groups internally to discuss how Workbooks.com is working for their users. As the system is flexible and easy to use they will be able to make changes resulting from these meetings to meet their growing requirements.

Trever concluded, "Before everyone was doing their own thing, there wasn't any structure around the sales stages; we needed a process in place that everyone could follow. Now that the structure is in place we are excited to see how using Workbooks can improve our sales processes and membership management even more."

About

INDUSTRY

Trade Association & Professional Bodies

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

March 2013

TECHNOLOGY

- Workbooks CRM
- Outlook Connector
- Audit

Contact Workbooks

EMAIL

sales@workbooks.com

PHONE

+44 (0) 118 303 0100

LINKEDIN

[linkedin.com/company/workbooks-com](https://www.linkedin.com/company/workbooks-com)

TWITTER

twitter.com/workbooks

WEBSITE

workbooks.com