

Success Story

WORKBOOKS HELPS TAOPIX REDUCE OPERATIONAL COSTS

Customer data at the click of a button - previously taking days, saving staff valuable time.



“THE PROCESS ENGINE IN WORKBOOKS HAS ENABLED US TO AUTOMATE SEVERAL PROCESSES, SAVING US SIGNIFICANT TIME.”

James Gray - CEO at Taopix Limited

INTRO

Taopix Limited is a privately-funded software development company, with offices in the UK, Singapore, Japan and the United States of America. Their primary focus is to provide a superior photo book and photo gift software platform to digital printers and photo finishing companies.

The company sells and supports its software worldwide through a global network of 30 distributors operating in over 50 countries. Strategic partnerships have also been established with leading digital print manufacturers, photo printing solution providers and finishing equipment manufacturers to drive sales and promote Taopix awareness worldwide. Industry-leading businesses including the AA and Saga are using the Taopix platform.



JOINED-UP VIEW OF CUSTOMERS



AUTOMATED PROCESSES SAVING TIME & COSTS



EFFECTIVE QUOTE, ORDER, CONTRACT & INVOICE MANAGEMENT

EXISTING SYSTEMS FEELING THE STRAIN

Taopix had a system in place from SugarCRM to deal with leads, opportunity management and support case management, working alongside Sage to manage accounts and invoices and up to 40 Google Docs and spreadsheets to record information and produce management reports.

As Taopix's business expanded, it became evident that their existing systems were inhibiting growth and making it difficult to manage the business, share information and have a joined up view of their customers.

With many manual processes including lead distribution, quoting and invoicing, a considerable amount of employee working hours were being invested into the business' basic operation.

“HOW CAN A FIRM GROW WHEN IT CANNOT EVEN FOCUS ON ITS MAIN BUSINESS ACTIVITY? WE CONSIDERED OURSELVES A PROGRESSIVE COMPANY AND AS SUCH COULD NOT REALISTICALLY CONTINUE SPENDING TIME AND RESOURCE ON AN OUT OF DATE WAY OF WORKING.”

James Gray - CEO at Taopix Limited

FINDING A SOLUTION

It was evident that Taopix needed a more robust CRM system to help solve these headaches. With a joined-up system, and a newly-streamlined business operation, customer interaction would be more efficient and profitable.

KEY REQUIREMENTS

To help make the process easier, Taopix enlisted a consultant to help establish a list of key requirements that they needed their new CRM system to meet:

- Quote and order management
- Integration with the existing Sage accounting system for the production of invoices
- Royalty payment management
- Lead and opportunity management
- Contract control and renewal reminders

The system also needed to be web-based in order to give easy access to distributors in different territories, and be flexible enough to add new data fields as required. This was key; the new CRM system had to be mouldable to suit the business' current and future working patterns.

THE WORKBOOKS WAY

Taopix looked at 65 CRM providers initially, which turned into a shortlist of 20 CRM vendors, including established brands such as Salesforce and Microsoft. The Workbooks cloud based CRM system came out on top.

“THE MAJORITY OF THE SYSTEMS WE LOOKED AT DIDN’T OFFER ALL OF OUR REQUIREMENTS IN ONE SYSTEM AND THOSE THAT DID TURNED OUT TO BE VERY COSTLY. WORKBOOKS CAME TO US WITH A REASONABLY-PRICED SOLUTION WHICH REPRESENTED GOOD VALUE FOR MONEY.”

James Gray - CEO at Taopix Limited

SALES GROWTH

Using the Workbooks CRM system, Taopix has been able to significantly grow its sales. Workbooks provides the sales staff with the tools they need to effectively manage their pipeline, create quotations and raise orders.

INSIGHT INTO VITAL BUSINESS INFORMATION

A key benefit that Workbooks delivers is powerful reporting, allowing Taopix to produce a summary of customer data at the click of a button – a process which would have previously taken days to collate from different spreadsheets.

Gray explains: “One of the most vital new tools at our disposal is Workbooks’ report-writing abilities.” Gray continued: “We can now create powerful reports from data that was previously not being used to its full potential. Keeping tabs on money owed to us is easier with a real-time system. Previously, reports would take time to compile and once complete, were automatically out of date.”

The Workbooks CRM system also gives the whole team access to a granular level of reporting, with the ability to filter data and drill down to specific pieces of data when required, instead of needing to speak to the sales or finance teams to gather the relevant information and then produce a report.

REDUCED COSTS AND STREAMLINED PROCESSES

By automating previously manual tasks, Workbooks has significantly reduced Taopix’s operating costs and saves its staff valuable time. Taopix is using the Workbooks Process Engine to automate business processes.

Gray explained: “The Process Engine in Workbooks has enabled us to automate several processes saving us significant time. We now capture leads from our website and automatically distribute them to partners, ensuring partners get the right leads quickly and that we can track their progress”.

He continued: "We have also automated our month end invoicing run. Previously we would manually create invoices in Sage and then email them to customers; this is now fully automatic in Workbooks taking just a few minutes, whereas previously it would take 6 or 7 days."

Gray also estimates that the marketing team are saving about two days a month by having access to an up-to-date database of customer and prospect information.

IMPROVED CUSTOMER SERVICE

Another benefit of adopting Workbooks has been an improved way of working for the Taopix support team. Workbooks provides automated support ticket management which empowers Taopix to offer improved levels of service and keep track of their Service Level Agreements.

Gray commented: "Many of our customers are overseas so support questions typically arrive by email. In the old system we had to manually 'copy and paste' emails into SugarCRM and constantly monitor the email inbox for customer communication."

He continued: "With Workbooks it's much easier: when a new support question arrives via email, a new case is automatically created and the customer is automatically sent a response with a case reference number. When the customer responds, the email is automatically stored against the case and our support team are notified – which means we can offer a better level of service and keep track of our Service Level Agreements."

"WORKBOOKS HAS REALLY TRANSFORMED THE WAY OUR BUSINESS RUNS AND HAS STARTED TO PAY FOR ITSELF, PROVIDING AN INSTANT REDUCTION IN TECHNOLOGY SPEND AND RESOURCE ALLOCATED TO MANUAL TASKS. WORKBOOKS HAS EQUIPPED US TO FOCUS ON DELIVERING THE BEST SERVICE WE CAN FOR CLIENTS, AND THE FUTURE LOOKS BRIGHT WITH A RENEWED SENSE OF DIRECTION FOR TAOPIX."

James Gray - CEO at Taopix Limited

About

INDUSTRY

IT & Telco

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

October 2011

TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Pro

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