

## Success Story

# THE EXCHANGE LAB: A CONNECTED SALES TEAM AND EFFECTIVE CAMPAIGN MANAGEMENT

Workbooks CRM assists the operations team in managing campaigns



“WORKBOOKS HAS BROUGHT THE PEOPLE AND THE INFORMATION SURROUNDING THE CAMPAIGN TOGETHER INTO ONE PLACE. CRUCIALLY, THE QA AND QUALITY CONTROL FOR A CAMPAIGN IS MUCH EASIER.”

Sara - Business Ops Manager, The Exchange Lab

## INTRO

The Exchange Lab use market leading technology and industry expertise to find the best inventory for clients buying online advertising space to run advertising campaigns. They are unique in being able to offer trading services across all ad exchanges and supply side platforms. The company also collates a wide range of statistics from the campaigns to optimise the results and ensure that their clients are reaching the right demographic.



EFFECTIVE CAMPAIGN  
MEMBERSHIP



SALES PIPELINE  
VISIBILITY



FULL OPPORTUNITY  
MANAGEMENT

## STUNTED GROWTH

The Exchange Lab has grown at a rapid rate since its inception in 2008 and now has 45 employees across the UK, Canada and Australia. The company was initially using spreadsheets and Outlook to share data, calculate the sales pipeline and keep track of all communication around a particular client or campaign. The silos of data that existed across the two platforms made it too cumbersome for the company to expand.

Sara, Business Operations Manager at the Exchange Lab explains that it was a 'no-brainer' that they needed to invest in a CRM system to give them freedom to grow; "Our initial requirement was for a CRM system that would support growth. We needed our sales team to have visibility of their pipeline, be able to track against their sales targets and have an understanding of what business was coming."

**"THE BIGGEST PAIN POINT WAS THAT WE COULDN'T EASILY SHARE DATA AND UNDERSTAND HOW OPPORTUNITIES WERE PROGRESSING. WE NEEDED A SYSTEM THAT WOULD STREAMLINE OUR SALES PROCESS AND ENABLE US TO GROW TO OUR POTENTIAL."**

**Sara** - Business Ops Manager

## WHY WORKBOOKS?

The Exchange Lab team first heard about Workbooks via a CRM consultant. The team liked the history behind the development of the product.

**"WE CHOSE WORKBOOKS BECAUSE WE HEARD THAT THE TEAM HAD TAKEN WHAT WORKED IN THE MARKET LEADING CRM PRODUCTS, SUCH AS SALESFORCE, AND HAD ADDED ADDITIONAL FEATURES AND FUNCTIONALITY. WE FELT LIKE WE WERE GETTING AN EVEN BETTER VERSION OF THE MARKET LEADING PRODUCT."**

**Sara** - Business Ops Manager

## PIPELINE MANAGEMENT

Following the Workbooks implementation, the sales team at The Exchange Lab quickly realised the benefits of a joined-up CRM system. Sara said, "The hardest part was getting people to change their previous habits and initially it was perceived as creating more work. However, they quickly changed their minds when they realised that the system would streamline the sales cycle. We can now see exactly how much business we have in the pipe and can monitor all the communication around a particular deal. The reporting functionality has also massively improved the billing process."

## CAMPAIGN MANAGEMENT

Whilst the initial requirements centred on enabling growth, the application of the CRM was quickly extended to operational campaign management. The Exchange Lab runs online media campaigns on behalf of their clients, so they needed a system that would assist the operations team in managing the campaigns.

Sara explains, "After a few months of using Workbooks, we began to investigate whether the system could meet our campaign management needs."

**"WE NEEDED WORKBOOKS TO FACILITATE TWO THINGS; FIRSTLY, CONNECT THE SALES TEAM WITH THE OPERATIONS TEAM SO THAT THEY COULD TAKE OVER THE MANAGEMENT OF A CAMPAIGN ONCE A SALE HAD BEEN CLOSED, AND SECONDLY; GIVE THE OPERATIONS TEAM A PLACE FROM WHICH THEY CAN MANAGE THE CAMPAIGN."**

**Sara** - Business Ops Manager

Workbooks has been designed to be flexible and adaptable so Sara was able to set up the campaign management functionality herself using the Workbooks default case management functionality and customising it accordingly.

**"WE NOW USE A CASE AS A HOLDING AREA FOR CAMPAIGN MANAGEMENT, IT OFFERS A PLACE WHERE THE SALES REPS AND THE CAMPAIGN MANAGERS CAN COMMUNICATE WITH ONE ANOTHER AND MONITOR THE PROGRESS AND SUCCESS OF A CAMPAIGN."**

**Sara** - Business Ops Manager

“This has been the biggest benefit for us,” Sara continues, “We have been able to design and customise the system ourselves to suit our industry specific requirements.”

**“PREVIOUSLY THERE WAS A SCATTERED PROCESS FOR CAMPAIGN MANAGEMENT, WITH INFORMATION RECORDED ON NUMEROUS PLATFORMS, WHEREAS NOW WE HAVE CONTINUITY AND TRANSPARENCY BECAUSE WORKBOOKS HAS BROUGHT THE PEOPLE AND THE INFORMATION SURROUNDING THE CAMPAIGN TOGETHER INTO ONE PLACE. CRUCIALLY, THE QA AND QUALITY CONTROL FOR A CAMPAIGN IS MUCH EASIER.”**

**Sara** - Business Ops Manager

To conclude Sara said, “Workbooks has fast become a business critical system for us and the whole team use it all day, every day.”

## SUPPORT WHEN YOU NEED IT

The Exchange Lab haven't looked back since choosing Workbooks and Sara says that one reason for this is the dedicated support team at Workbooks; “They are really approachable, helpful and easy to talk to. I feel like I can call them any time and they are like a dog with a bone with each issue – they would go to the end of the earth to find the right answer! Workbooks have provided fantastic fast and reliable support since day one and I wouldn't hesitate in recommending this product.”

## About

### INDUSTRY

Marketing & Advertising

### NUMBER OF EMPLOYEES

51-200

### IMPLEMENTATION DATE

May 2011

### TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Pro

## Contact Workbooks

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