

Success Story

WORKBOOKS GIVES HELEN BRETT THE ABILITY TO COLLECT MONEY FASTER & SLICKER

Since implementing Workbooks CRM, Helen Brett has increased the number of deposits paid by 3%



HELEN BRETT

“WORKBOOKS HAS GIVEN INTELLIGENCE TO OUR TEAM SO THEY CAN SPEAK TO CUSTOMERS & DEAL WITH QUERIES WITHOUT HAVING TO GO BACK AND FORTH.”

Brett Kolinekn - Director of Corporate Operations

INTRO

Helen Brett Enterprises is a 4th generation family owned business.

The company started life when the family put on a cash and carry jewellery and gift trade show, and it has now grown to become the leader in cash and carry trade show production and management in the United States.



ENHANCED INTELLIGENCE



INCREASED CASHFLOW



REDUCED REDUNDANCIES

NO VISIBILITY

For each trade show, exhibitors reserve a trade show space and place a deposit with Helen Brett Enterprises. Using a manual, paper-based system, the sales team had difficulty keeping track of all the accounts assigned to them.

The company quickly realized that they needed a CRM system to enable them to keep track of all the buyers, sellers, people and organizations that they were contacting.

Brett Kolinek, the Director of Corporate Operations, explains: “The sales team didn’t have customer lists at their fingertips and they often had to combine lots of reports to get visibility of this kind of data.

This meant that it was hard to keep an accurate and up-to-date records of those who had booked a place at a show and whether they had paid their deposit. We also had a lot of contacts being called by multiple sales reps without other sales reps having any visibility of the previous communication to this customer.”

THE SEARCH FOR A CRM

Brett heard about Workbooks in an article on CRM for small to medium businesses. He narrowed the search down from 15 vendors to a shortlist of 5 vendors including Workbooks, Oracle, Netsuite and InfusionSoft. The company unanimously agreed that Workbooks met all their requirements and seemed like the best fit.

“THE SALES STAFF DRAGGED THEIR FEET INITIALLY BUT AFTER 2-3 WEEKS WE STARTED GETTING A LOT OF PRAISE FROM THE TEAM AND HAVE HAD REALLY GOOD FEEDBACK. THE WORKBOOKS TEAM HAVE BEEN VERY EFFICIENT AND RESPONSIVE. WORKBOOKS HAS GONE ABOVE AND BEYOND AND IT’S BEEN A GREAT RELATIONSHIP FOR US.”

Brett Kolinek - Director of Corporate Operations

SMOOTH IMPLEMENTATION

Brett felt that the implementation process ran smoothly. Brett received training on the system and was then equipped to teach the rest of the company how to use Workbooks.

KEEPING TRACK OF ALL COMMUNICATION

“We needed a CRM that could create cookie crumbs of the contact that we have made with people and organizations. Workbooks gives the entire sales team visibility of all communication that we have had with a person or their organization,” says Brett.

Brett explains, “With Workbooks, our sales team can keep tabs on who has reserved a space at a show and whether they have paid their deposit. The ability to collect money in a faster and slicker manner has been really helpful and we have noticed the number of deposits paid has increased by 3%.

INTEGRATION WITH EMAILS

The nature of their business means that the employees of Helen Brett Enterprises send out a lot of email communications.

“WE WERE PLEASED TO FIND A SYSTEM THAT COULD INTEGRATE WITH OUTLOOK. WORKBOOKS ENABLES US TO KEEP A RECORD OF ALL THE EMAILS THAT HAVE BEEN SENT TO EXHIBITORS AND TRADE SHOW ATTENDEES. ANYONE IN THE TEAM CAN TRACK THE EMAILS THAT HAVE BEEN SENT TO A PARTICULAR CONTACT, EVEN IF THEY WERE NOT RESPONSIBLE FOR THE INITIAL EMAIL COMMUNICATION.”

Brett Kolinek - Director of Corporate Operations

CRM ON THE GO

With outside sales reps and field reps working on the road, Helen Brett Enterprises needed a web based system that could be accessed from any location at any time.

“With Workbooks our sales reps can add leads to our Workbooks system whilst they are on the road or at an exhibition. It is now easy to follow up with any company that we engage with at a trade show.

Also, if an exhibitor at a trade show says that they requested a different booth location or a connection to an electricity supply, our reps at the show can log into Workbooks and check.”

About

"Workbooks has really given intelligence to our team so that they can speak with customers and deal with queries without having to go back and forth to the rep that initially dealt with the customer."

The CEO of Helen Brett Enterprises is based in a different location from the rest of the team, therefore the fact that Workbooks is a web-based system is invaluable to him.

He can log into Workbooks and run reports on the progress of the company with the confidence that he is seeing up-to-date numbers, and that the rest of the organization can see the same numbers as he can

REDUCED REDUNDANCIES IN BUSINESS

"THE MAIN BENEFIT OF WORKBOOKS IS THAT IT HAS REDUCED THE REDUNDANCIES OF BUSINESS. I WOULD RECOMMEND WORKBOOKS AND KNOW COLLEAGUES WHO WOULD AS WELL."

Brett Kolinek - Director of Corporate Operations

INDUSTRY

Wholesale, Retail & Distribution

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

April 2011

TECHNOLOGY

- Workbooks CRM
- Outlook Connector

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