Success Story

WORKBOOKS HELPS IMPROVE BUSINESS PROCESSES AND BRINGS DEPARTMENTS TOGETHER

Sales order processing made easy and greater visibility into the sales process

atgmedia

"THE GREAT THING ABOUT WORKBOOKS IS THAT IT PROVIDES US WITH THE ABILITY TO MANAGE OUR SALES ORDER PROCESSING FROM WITHIN OUR CRM SYSTEM."

Simon Berti – Sales Director at ATG Media

INTRO

ATG Media is the UK's leading provider of specialist information and services to the fine art and antiques industry.

ATG launched in 1971 as a niche publisher for the antiques sector, but in recent years has shifted its focus to become a global pioneer of live and timed online auctions. This involves keeping track of a network of prospects, clients and agencies; managing the sale and fulfilment of advertising opportunities across ATG's portfolio of auction sites, bidding platforms and publications; as well as tracking payments and cash flow; and measuring industry specific KPIs such as yield per page and cost per single column centimetre.

EFFICIENT SALES ORDER PROCESSING

IMPROVE OPERATIONS

BRING TEAMS TOGETHER

OUTGROWING ADTRAK

Prior to implementing Workbooks, ATG Media were using a legacy, industry-specific advert management system called AdTrak.

Simon Berti, Sales Director at ATG Media, said, "AdTrak had served us well over the years. However, we outgrew it for two key reasons. Firstly, it was an MS-DOS system and therefore wasn't supported by recent versions of Windows, which prevented us from upgrading our infrastructure beyond Windows XP. For this reason we had to conclude that it did not have the capacity to grow with our business."

Simon continued, "Secondly, although AdTrak was good for booking adverts and managing the KPIs that a traditional publishing company would want to monitor, it was fairly antiquated and had limited functionality compared to more modern, next generation systems. What we needed was a system that combined the industry specific functionality that AdTrak offered with comprehensive contact management and CRM functionality."

Another key factor was that AdTrak could not be used by the entire ATG team. It was important to ATG that the whole company had a single, accessible system in which they could record, and have visibility of, ATG Media's customer engagement, sales orders and cash flow.

> **"WHAT WE NEEDED WAS A SYSTEM THAT COMBINED THE INDUSTRY SPECIFIC FUNCTIONALITY THAT ADTRAK OFFERED WITH COMPREHENSIVE CONTACT MANAGEMENT AND CRM FUNCTIONALITY."**

Simon Berti - Sales Director at ATG Media

FINDING THE RIGHT SOLUTION

ATG Media looked at a number of different options in their search for a new solution.

Simon explains, "We looked at industry specific solutions, including Ad DEPOT by 5fifteen. However, we felt that most of these would only have been relevant for a small part of our business; the management of adverts, and wouldn't have sufficient scope to support the other areas."

"In particular, we weren't convinced that industry specific solutions would be able to handle the range of web based products that we offer. In the end, we shortlisted two CRM products: Salesforce and Workbooks."

Simon continues, "We decided to go with Workbooks because the team at Workbooks were willing to provide us with a bespoke solution that would enable us to manage the sales and order processing of our numerous print and online products, whilst also providing impressive CRM and business functionality that could support our rapid expansion and the changing focus of our business."

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EFFECTIVE CONTACT MANAGEMENT

The holistic view provided by Workbooks' contact management functionality enables ATG Media to effectively manage their database of prospective customers, agencies and clients.

MANAGING THE SALE OF ADVERTS

ATG Media use Workbooks' comprehensive sales order processing functionality to manage the sale of advertising opportunities. Workbooks facilitates the sale of multiple adverts in a single order, and its configuration tool automatically populates line items, thus reducing the scope for human error.

> "THE GREAT THING ABOUT WORKBOOKS IS THAT IT PROVIDES US WITH THE ABILITY TO MANAGE OUR SALES ORDER PROCESSING FROM WITHIN OUR CRM SYSTEM. THE WHOLE TEAM CAN ACCESS ORDER DETAILS AND CAN MONITOR ORDER FULFILMENT. IT IS INVALUABLE TO US THAT THIS DATA IS HELD WITHIN THE SAME SYSTEM THAT WE USE TO MANAGE OUR DATABASE OF CONTACTS, OUR SALES PIPELINE AND OUR INVOICES."

Simon Berti - Sales Director at ATG Media

STANDARDISING THE FORMAT OF ORDERS

Workbooks scripts have also allowed ATG to standardise the names given to orders raised by the sales team, meaning that all order names follow the same format and are easily searchable, where previously, the lack of consistency made it difficult to search for orders related to a particular client.

ALLOWING FOR SUBSEQUENT CHANGES TO AN ORDER

It is fairly common for a customer to request amendments to an order for multiple adverts after some of the adverts have already been fulfilled. Workbooks facilitates this by automatically locking the line items for the adverts that have been completed, but leaving line items for future adverts unlocked for editing.

Simon explains, "Clients often wish to change the issue number that an advert appears in, or to push an advert back by a couple of weeks. Workbooks provides the flexibility to do this."

MANAGING MULTIPLE DISCOUNT LEVELS

ATG often deal through agencies as well as directly with the client, and require the flexibility to apply both an agency discount and a client discount to a single order. Workbooks has been configured to enable ATG Media to allocate multiple discount levels within a single order.

MANAGING THE FULFILMENT OF ADVERTS

The production team at ATG Media will soon start using Workbooks to track the fulfilment of adverts. Workbooks is able to automatically create a case for each advert, which the team can then use to monitor the sign-off and completion of the adverts.

Simon looks forward to switching on this functionality, "It will be incredibly useful for the production team to be able to track the progress of the adverts that have been sold. This will unite the sales and production teams, giving them visibility of the same information relating to the activity around a particular advert."

SYNCING WITH THE FINANCE SYSTEM

The Workbooks Sagelink automates the synchronisation of data between Workbooks and ATG's Sage accounting system. This aims to ensure that the whole company is working from the same numbers and closes the loop so that ATG can see all their customer data within Workbooks, from the basic contact details right through to invoices and credit notes.

OVERALL: BRINGING THE COMPANY TOGETHER

To conclude, Simon says, "In recent years ATG Media has developed a series of ground breaking services for our customers without ensuring that our internal systems have kept pace; Workbooks has helped us to update our business processes and has brought each department of the company together. We were attracted by the ability to create bespoke order forms, and every team in the company can now manage client relationships and issue appropriate invoices for the services offered. We are looking forward to benefitting from future releases, especially with regards to reporting."