

Case Study

NATIONAL FEDERATION OF BUILDERS

TRUE TRANSPARENCY OF DATA



WHO IS *the National Federation of Builders?*

The National Federation of Builders (NFB) is an independent membership organisation that represents builders, contractors and housebuilders throughout England and Wales.

As one of the UK's longest standing trade bodies, NFB aims to represent the building profession and to promote conditions its members need to thrive and contribute to the economic success of the UK. Its members range from sole traders to multi-million-pound construction companies with annual turnovers of more than £500 million.

The federation provides expert advice, training, representation and business services for members so that they can comply with industry standards, excel in delivery, and grow successful businesses.

SECOND WAVE OF ADOPTION

NFB first implemented Workbooks in 2013 to drive sales improvements and enable better reporting for the management team. Adopting Workbooks had enabled NFB to move away from its former, rather fragmented approach that relied on multiple spreadsheets and a membership database, to a more integrated solution that gave the management team a full picture of the sales pipeline and made monthly reporting much more straightforward.

In 2018 the decision was taken to extend the CRM to the rest of the organisation. This encompassed five new areas: marketing, policy, finance, business development and membership services.

EASY IMPLEMENTATION

When NFB first adopted Workbooks, a full implementation process was followed, from gathering requirements to an initial build, then testing, training, rollout and user acceptance support, all with extensive input from Workbooks, of course.

When the time came to roll out to the wider organisation, NFB's subscriptions and CRM manager Tracy Perry decided on a more home-grown approach.



We knew we were going to extend team by team rather than trying to cover everyone at once. And one of the good things about Workbooks is that functionality is mirrored from landing page to landing page – the basic principles remain the same – which makes everything a lot easier.

Tracy Perry

SUBSCRIPTIONS AND CRM MANAGER,
NATIONAL FEDERATION OF BUILDERS

"This gave us the confidence to manage the rollout ourselves. I was able to use a lot of Workbooks' resources and tools from its online knowledge base and easily adapt them into a training manual for our users. The manual says what technical functionality a page has but then depending on which department people work in we've provided more prescriptive process maps giving them a step-by-step guide. We've been able to build it up into a series of bite-sized training for anyone."

"Different departments have different requirements – our membership services team, for instance, needs to be able to drill down into all of our data – so it's really useful that we can configure each department's layout to suit them."



CLEAR BENEFITS

Workbooks is now being used across the organisation, with more functionality being added all the time – but at a pace that suits NFB.

One of the immediate benefits of rolling out Workbooks was the flexibility it offered. Tracy says: “We really like the way Workbooks enables us to consolidate lots of data in one place. We can put all of our key performance indicators into one report and present it as a dashboard that tracks all sorts of things, including sales, conversion rates, online activities, hit rates and bounce rates on our marketing campaigns... It’s lots of little things that means we don’t have to send numerous emails to different departments to tell them what’s happening. It saves time and helps us to enforce our processes. And having past data enables us to build really useful year-on-year comparisons.”

Time is the other main benefit, according to Tracy. She says: “Having all the data so easily to hand saves us huge amounts of time. I used to spend nearly a week on monthly reports – pulling together different elements from multiple spreadsheets but now all the data is consolidated in Workbooks it takes me about a day, if that. That alone has saved me four days a month.”

“Our membership services team has also benefitted from time savings. Summarising member benefits stops you having to read through lots of activity notes and online activity. Now it’s all consolidated into key points outlining member value – which is available at the touch of a button.”

“And from the business development point of view it helps us react so much more quickly, which drives interest among potential members because they’re impressed by our speed of response.”

THE COVID-19 EFFECT

The coronavirus pandemic and subsequent lockdown had a huge and well-publicised impact on the construction sector.

NFB’s advice lines were kept open throughout and NFB engaged in extensive marketing communications during the lockdown period. This meant that both staff and systems had to be hugely flexible, with staff members who usually engage with members moving temporarily to new advisory service roles, for example.

Tracy says Workbooks didn’t disappoint: “Our CRM had to be as flexible as we were during this difficult time and one of the noteworthy things about Workbooks is that it was never an issue as we quickly changed our focus. **In fact, I’d say it enhanced our ability to deliver what we needed to.**”



LOOKING AHEAD

NFB is already using a significant amount of the Workbooks functionality and is therefore now successfully tracking all aspects of sales income; managing marketing leads and campaigns through the workbooks automation tool; they have a much better understanding of the content that their members are interacting with and they even invoice through CRM. All of this underpinned by the reporting that they need to stay agile and adapt.

Going forward Tracy foresees NFB using Workbooks' survey functionality more for policy and engagement. She expects the marketing team to embrace the CRM's social media capabilities too, she's also speaking to NFB's membership services team about what processes they might want to explore or enhance. And the finance team are looking at ways to incorporate advance notice messaging for member subscriptions.

HAPPY CUSTOMER

Overall, Tracy Perry and the NFB team are delighted with the difference Workbooks has made to their business.

She says: "If something isn't working for us then we can change it ourselves because it's so easy to do. But when we do need to contact Workbooks support, **the level of service we get is truly amazing.** We've never had any problems getting help – it's always easy to call or log online and the online help section is spot on. **I can honestly say we've never experienced service as good as that from any of our support services.**"

"I think it all boils down to the transparency of the data, we now have all the information we need at our fingertips to help drive our business strategy. It's invaluable."

ABOUT

INDUSTRY

Trade Association & Professional Bodies

NUMBER OF EMPLOYEES

50-100 employees

IMPLEMENTATION DATE

March 2013

TECHNOLOGY

- Workbooks CRM
- Workbooks Business Pro
- Web Insights
- Spotler
- Outlook Connector
- Audit