

## Success Story

# WORKBOOKS HELPS PALAGAN INCREASE PRODUCTIVITY, TIGHTEN PROCESSES AND GAIN GREATER VISIBILITY

Palagan implemented Workbooks CRM and saw a 80% time reduction in its quoting process.



**“CUSTOMER EXPERIENCE IS BECOMING A MAJOR DIFFERENTIATOR AND WORKBOOKS HELPS US PROVIDE A BETTER EXPERIENCE FOR OUR CUSTOMERS.”**

**Adam Priestley** - Business Development Manager

## INTRO

Established in 1975, Palagan specialises in the manufacture of customised high performance polythene packaging. Its products include furniture packaging, pallet covers, heavy duty sacks, and a range of tubing and sheeting.

It sells directly to industry and has hundreds of customers, almost all of which are in the UK. With an annual turnover of around £12 million, it was in 2007 acquired by Plastic Capital, a group of half a dozen firms all specialising in some niche aspect of plastics.

Adam Priestley is Business Development Manager, a wide-ranging role encompassing marketing, IT, operations and much else besides. In 2016 he implemented the company's first CRM system, beginning the build in February and going live in June. It is a project that has already yielded significant benefits for the firm, and which has opened up many other opportunities for the future.



**MORE EFFICIENT PROCESSES**



**INCREASED PRODUCTIVITY**



**TIME SAVINGS**

## GAINING VISIBILITY

Priestley outlines the two reasons why he decided the firm needed a CRM system. “We sell a consumable product, so most of our business is repeat business. Many of our core clients make a monthly order. When they pick up the phone to us we need to know who they are, what they’ve ordered before, and so on. We needed a central database to hold all that data.”

He continues: “Keeping all the information in one place would be a major step forward, but we also needed a system that would allow us to manage the pipeline of opportunities. Whilst some of our leads come through website enquiries or referrals, many come through outbound lead generation. A CRM software would allow us to track these leads from lead to opportunity to quote to order, giving us better visibility of future new business.”

## THE RIGHT PROVIDER

Originally Palagan looked at a joint solution with a sister company, but Priestley quickly concluded that the two companies had too widely differing needs. The firm uses Microsoft’s accounting package so he looked at the CRM solution from that provider. Again it was not the right fit.

“We are not a huge company” he explains. “It was important for us to work with a company where we knew the people and they knew us. A global vendor of that size didn’t feel quite right. Also, the people who ran the demo for Microsoft Dynamics didn’t seem to know the system all that well.”

He also considered open source provider SuiteCRM. “We decided we didn’t want to have the responsibility of maintaining it ourselves. Ultimately we’re not a software company. We chose Workbooks because it was easy to use and would give us all the functionality we needed.”

Workbooks came in to spend a day training the team on the system. Priestley took the materials provided by Workbooks to create a user manual. Then the team began extracting contact data from other systems like accounting software, people’s individual Outlook, and so on.

**“THE PROCESS WAS EASIER THAN WE EXPECTED. USING SPREADSHEETS, WE CONSOLIDATED ALL OF THE DATA ACROSS THE BUSINESS. IT ONLY TOOK TWO WEEKS TO POPULATE THE SYSTEM WITH ALL THE NAMES, ADDRESSES, EMAILS, PHONE NUMBERS, RELEVANT DOCUMENTS AND SO ON FOR OUR 700 CUSTOMERS. AND THEN WE WERE READY TO GO.”**

**Adam Priestley - Business Development Manager**

## MORE EFFICIENT PROCESSES, ULTIMATELY SAVING TIME AND INCREASING PRODUCTIVITY

Palagan has already achieved its initial objectives of recording customer interactions and providing pipeline visibility. The sales team logs all customer interactions on Workbooks, so even if one of the team is ill or on holiday or out with a customer, a colleague can speak to their customer and be up to date with their contact information, order history, service preferences and so on. The company can also track new business from lead to opportunity to quote to order, which gives them better visibility of future new business so they can plan resources better.

Priestley adds: "It is allowing us to allocate tasks within the sales team," he says. "We have an email alert that goes out every Monday morning showing each person their open opportunities and quotes where they've had no response. In the past it was easy to forget about quotes, but this has tightened up the process. We used to have overloaded external people and underused internal people, but the new system allows us to allocate our sales resource much more effectively."

Workbooks is also delivering additional benefits. "We launched a new website in December," he says. "Whereas website enquiries used to go into an inbox and managing them was time-consuming and inefficient, now they go straight into Workbooks, so the team can track and respond to them much more rapidly. As well as helping us improve our response time, it also gives us a better idea of how well our online advertising is working, which will help us make better decisions on marketing investment in the future."

**"WORKBOOKS IS ALSO HELPING PALAGAN IN OTHER WAYS. IN PARTICULAR, IT HAS ACCELERATED THE QUOTING PROCESS, REDUCING IT FROM A MULTI-STEP PROCESS THAT TOOK 15 TO 20 MINUTES TO A SIMPLE PROCESS THAT TAKES JUST THREE TO FOUR MINUTES – A 80% REDUCTION."**

**Adam Priestley** - Business Development Manager

## FUTURE DEVELOPMENTS

Priestley deliberately began with a simple implementation of Workbooks. Now it is running smoothly he is adding in greater functionality. He has begun a piece of work which will automatically convert quotes in Workbooks into an order and send to the firm's accounting software, further streamlining that process.

He says: "I envisage us reaching the point where all customer focused parts of the business operate out of Workbooks. It might take a while but if we can get there it will be really beneficial for the business. Customer experience is becoming a major differentiator, and Workbooks helps us provide a better experience for our customers."

It is also providing a better experience for the Palagan team. Perhaps the best example of this is the story he tells of a member of the sales team who has been with the company for more than 30 years. He has seen countless new systems come and go, and was sceptical about this latest innovation.

**"AFTER A FEW WEEKS OF USING WORKBOOKS HE HAD A WORD WITH ME ABOUT IT. HE WANTED TO TELL ME HOW STRAIGHTFORWARD HE FINDS IT TO USE, HOW MUCH EASIER IT MAKES HIS JOB, AND HOW HE THINKS IT'S BRILLIANT. THAT WAS THE CONFIRMATION WE NEEDED THAT WE'D MADE THE RIGHT CHOICE!"**

**Adam Priestley** - Business Development Manager

## About

### INDUSTRY

Manufacturing

### NUMBER OF EMPLOYEES

11-50

### IMPLEMENTATION DATE

March 2016

### TECHNOLOGY

- Workbooks Business
- Audit & Contract mgt
- Outlook Connector
- Mapping Module

## Contact Workbooks

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