

Success Story

WORKBOOKS CRM UNDERPINS SAV SYSTEMS GROWTH

Workbooks CRM has not only significantly enhanced SAV Systems professionalism but also helped them to target the right products at the right market segments.



“IN A RELATIVELY SHORT SPACE OF TIME WORKBOOKS CRM HAS BECOME ONE OF THOSE BUSINESS-CRITICAL TOOLS THAT WE JUST COULD NOT DO WITHOUT”

Jose de Almeida - General Manager

INTRO

Already an established provider of energy efficient heating and ventilation solutions, SAV Systems has in the past four years grown turnover from £7m to £25m. It has relied on its CRM system from Workbooks to help it manage that rapid growth. That CRM is now a 60-seat implementation and an integral part of the day-to-day work of SAV Systems.

SAV Systems has 75 staff, mostly based in its Woking head office and operational centre, but also in Edinburgh, Manchester and Bath. Whether it is offices, homes, prisons, leisure centres, hotels, hospitals, student accommodation, or anywhere else with a need for heating, SAV Systems helps organisations reduce the CO2 impact of their heating.

One of its leading products is the range of Danfoss Flatstation solutions. These had been established in Scandinavia for more than 20 years, but SAV Systems was the first company to bring them to the UK. Whilst it operates in a competitive space it now has around a 25% share of the market and is in a strong position for continued growth.



SUPERIOR CUSTOMER EXPERIENCE



SUPPORT REVENUE GROWTH



STRATEGIC INTELLIGENCE

RAPID GROWTH

The team at SAV Systems took the decision to invest in CRM in 2013. “We had used a very basic CRM system since 2001,” recalls Jose de Almeida, General Manager. “It was entirely focused on project management, giving projects their own reference number and allowing us to do some simple tracking of which people were on which projects.”

He continues: “It was very unsophisticated, and while it had done a job for 12 years, we knew we were poised for fairly rapid growth and so we needed a CRM system that would allow us to record and track prospects, and gain a single view of our customers as well as overall intelligence on markets.”

MAKING IT EASY

SAV Systems began its search for a CRM solution by talking to Salesforce and Microsoft. “It quickly became clear they weren’t very excited by the idea of an implementation of only 20 users, so we began to look elsewhere,” says de Almeida. “Our finance team uses SAGE so we looked at SAGE CRM, but it felt like a solution built more for finance than business.”

The team reviewed a wide range of possibilities, looking for one that would give the company the functionality it needed, would be easy to operate, and would require little administrative support. Eventually they got down to a final two.

“WE CHOSE WORKBOOKS BECAUSE THE WORKBOOKS TEAM REALLY UNDERSTOOD US. THEY LISTENED TO WHAT WE WANTED AND PRESENTED THE SOLUTION THAT WOULD ACHIEVE THAT.

THEY CLEARLY DEMONSTRATED THAT THEY COULD ADDRESS OUR NEEDS AND THEY ALSO OFFERED A STRONG IMPLEMENTATION STRATEGY. WE ALSO LIKED THE FACT IT IS A YOUNG COMPANY FAIRLY LOCAL TO US.”



Jose de Almeida - General Manager

IMPLEMENTATION

De Almeida and his team worked closely with their Workbooks Consultant on the implementation. Workbooks spent time with them onsite in Woking, guiding them through the process and ensuring it was set up correctly.

SAV Systems did the data capture and management internally, and de Almeida worked with the various user groups explaining to them the benefits of the new CRM system. It all ensured that the entire company was able to go live at the same time and that there was a high adoption rate from that point.

“Our implementation went live on budget and on time. In fact we had a target go-live date of 4th July and a back-up date of 1st August, so when we went live on 1st July we were actually ahead of schedule, which is rare for an IT project.”

STRATEGIC INTELLIGENCE

SAV Systems now has 60 licences split across almost every part of the business. The only functions not to use it are finance and the warehouse. The company’s salespeople use it to track leads, and business intelligence uses it to gather insight into sector or geographic trends, but it is the technical support team that is the most active group.

“OUR TECHNICAL SUPPORT TEAM HAS GROWN FROM THREE ENGINEERS FIVE YEARS AGO TO 13 TODAY. WORKBOOKS HELPS US MANAGE THIS INCREASED TECHNICAL COMPETENCY, ALLOCATING ENGINEERS TO JOBS, SO THAT THE RIGHT SKILLS ARE APPLIED TO THE ISSUE AND WE PRODUCE BETTER AND FASTER RESULTS FOR OUR CUSTOMERS. OFFERING SUPERIOR SERVICES AND THE BEST CUSTOMER EXPERIENCE POSSIBLE IS KEY TO OUR ONGOING SUCCESS”

Jose de Almeida - General Manager

He adds: “More than this, with Workbooks we can record what has happened so we can look back at what we did, see how well it worked and learn from the experience. This strategic intelligence has not only significantly enhanced our professionalism, it has also helped us to target the right products at the right market segments. Workbooks CRM truly underpins our growth.”

BUSINESS-CRITICAL TOOL

SAV Systems has had a very positive experience with Workbooks, and is looking at ways to use the system further. "We know there is much more we can do with it", says de Almeida. "There is the enthusiasm here to extend it, but we need to ensure that whatever we do, it remains simple and benefit led."

He concludes: "At every stage so far it has been easy to implement and use, and has added value to the organisation - that is why it has become so integral to the way we work. In a relatively short space of time it has become one of those business-critical tools that we just could not do without."

About

INDUSTRY

Manufacturing

NUMBER OF EMPLOYEES

51-100

IMPLEMENTATION DATE

April 2013

TECHNOLOGY

- Workbooks CRM Pro
- Outlook Connector

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