

Success Story

WORKBOOKS CRM TO UNDERPIN SALES, MARKETING AND CUSTOMER HELPDESK

Better decision making by tracking marketing ROI, improved reporting and visibility across the organisation.



“IN THE PAST TWO OR THREE YEARS WORKBOOKS HAS BEEN TRANSFORMING OUR BUSINESS.”

Fiona Ellingham - Head of Marketing

INTRO

For more than 55 years TC Facilities Management has delivered facilities management services, including cleaning and security, to many of the UK's most well-known retailers, manufacturers, property firms, and other corporates. Headquartered in Tadworth, Surrey, it now operates in more than 5,500 locations nationwide.

THE NEED

When Fiona Ellingham joined as Head of Marketing in 2014, she discovered a clear need for CRM. “Up until that point all calls to the helpdesk were recorded on a server database,” she recalls. “It could take up to five minutes to open a record, and was a clunky and slow process. It was also hard to extract insight from the data.”

In fact, her predecessor had already selected a CRM platform: Salesforce. Ellingham knew from previous experience that Salesforce would be the wrong solution for TCFM. “It was more expensive than we needed, and wasn't the right fit in terms of functionality,” she explains. So, she embarked on a fresh procurement process.



IMPROVED PROCESSES



ROI TRACKING



ADVANCED REPORTING & GREATER INSIGHTS

SELECTION

The first step was for the sales, marketing, customer service and IT functions to collaborate in the creation of a requirements document. This identified the outcomes each team, and the organisation as a whole, was aiming for with a CRM implementation.

With this in place they invited in potential vendors: Microsoft Dynamics (partners), SugarCRM and Workbooks.

"WE CHOSE WORKBOOKS BECAUSE IT IS A SOLUTION THAT CAN GROW WITH US, AND BECAUSE THE TEAM THERE REALLY INVESTED THE TIME TO UNDERSTAND OUR CHALLENGES AND PAIN POINTS. THIS ALLOWED THEM TO PRESENT A MUCH MORE TAILORED AND RELEVANT SOLUTION. WE FELT CONFIDENT THAT WORKBOOKS WOULD DELIVER AND HELP US ACHIEVE THE OUTCOMES WE WANTED FOR THE BUSINESS."



Fiona Ellingham - Head of Marketing

IMPLEMENTATION

The helpdesk team was immediately enthusiastic about the new CRM system. "The team couldn't wait to replace it," she recalls. "In fact, I remember the day after they had the initial training, a couple of people came and personally thanked me for being a part of the implementation of Workbooks."

More broadly across the organisation, Workbooks is driving change in processes and behaviours. Salespeople now record contact and activities with prospects on Workbooks CRM, and so build up data that informs marketing activities, making those more effective.

In marketing, all leads generated are recorded on Workbooks under specific campaigns with assigned activities. "When people see the reports we can produce, and the way we can track leads through the pipeline, they're genuinely taken aback," says Ellingham. We can start demonstrating the ROI of our marketing campaigns to the business and it helps us make better decisions on where to spend our precious marketing budget to the best effect.

Ellingham has found another use for the CRM tool: to track her PR activity. She says: "I upload media contact lists, then run a mailshot campaign to issue media releases, and then I can track which are paid for opportunities and which not, and I can easily access all the actual coverage, and raise purchase orders as needed." She issues two or three press releases a month to 42 media partners and before Workbooks it was a logistical headache remembering which ones were paid for, how much they charged, and so on. Now it is all recorded in Workbooks and she can glance at a dashboard to see what is happening.

As for the delivery team, they have been just as receptive. Ellingham quotes one member of that team as saying: "Before you showed me this system I thought it was going to be just like another spreadsheet like tool, but it does so much more. This is going to help me run my whole life!"

WEB INSIGHTS FOR WEBSITE ANALYTICS

At the beginning of 2017, TCFM also implemented Web Insights, the lead generation and web analytics module from Workbooks, which allows companies to track potential customers that are visiting their website. "We decided to switch to Web Insights from Lead Forensics," explains Ellingham. "Lead Forensics had begun well but had just become too labour intensive, as we needed to cross-reference it with existing data we had across the organisation. We were also getting fewer and fewer leads through it. With Web Insights we get in context website information enabling us to identify which visitors are brand new to us and which ones are existing customers or prospects already engaged in a sales cycle. And the solution is significantly cheaper than Lead Forensics."

Web Insights provides Ellingham with intelligence on activity on the company's website. It scores visitors based on which pages they visit, allowing her to identify the most promising leads, which she then pass on to an external lead generation / telemarketing team for follow-up. The telemarketing agents have information on who has visited TCFM's site, their company name, activity, annual turnover, and can then get in touch and progress to an appointment where appropriate.

FUTURE

"CRM is about more than just technology," concludes Ellingham. "It is also a programme of change management, and as an organisation buys into the process it is transformational. In the past two or three years Workbooks has been transforming our business, and as we move to the next level, we will see greater things with it."

About

INDUSTRY

Professional Services

NUMBER OF EMPLOYEES

6000

IMPLEMENTATION DATE

Mar 2014

TECHNOLOGY

- Workbooks Business
- Outlook Connector
- Mapping Module
- Web Insights
- GatorMail

Customer video

Click [here](#) to see Fiona Ellingham talking about why TC Facilities Management chose Workbooks and how it has become a crucial tool for their Help Desk, Sales and Marketing teams.

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