

Success Story

WORKBOOKS ENABLES MULTREES TO TRACK ALL CUSTOMER ENGAGEMENT

Since implementing Workbooks, Multrees have complete visibility of their pipeline and can manage the progress of their opportunities.

 **MULTREES**

“NOT ONLY CAN WE MANAGE INBOUND QUERIES THAT WE RECEIVE FROM CUSTOMERS BUT WE CAN ALSO USE WORKBOOKS TO TRACK OUTBOUND QUERIES THAT WE SEND TO VENDORS.”

Clive Stelfox - Head of Client Relationship Management at Multrees

INTRO

Multrees Investor Services Ltd is a specialist provider of investment administration, consolidated reporting and custody services to investment managers and family offices. The company started life in 2011 and has already grown rapidly to 45 employees.

The company's clients are mostly boutique wealth managers in the high net worth segment. What makes Multrees Investor Services unique is that they offer a service built around their client's requirements.

The team take the time to gain an understanding of the specific needs of the client business and then construct a tailored service model that meets these specific needs through the process of engaged design.



COMPLETE VISIBILITY OF PIPELINE



IMPROVED CUSTOMER ENGAGEMENT



STREAMLINED SUPPORT

SUPPORTING THE SALES CYCLE

When a prospect becomes a customer, they entrust a number of important business processes over to Multrees Investor Services. This means that there is a long sales process that can last anything up to two years during which the team at Multrees is able to build a relationship of trust with the prospect. It was therefore vital for Multrees to invest in a CRM system that could maintain a record of all the interaction with a prospect during the long sales cycle.

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Clive Stelfox - Head of Client Relationship Management at Multrees

The company also needed to keep track of its communication with the numerous consultants, lawyers, journalists and industry experts that they liaise with on a regular basis.

“This information was initially held in spreadsheets,” says Clive, “If, for example, we wanted to run a press release, we would have to trawl through a spreadsheet to try and find the right contact and the right email address. This process became too arduous and time-consuming so we wanted a system that could hold all of the data and enable us to quickly find the right people when we needed to.”

FACILITATING CASE MANAGEMENT

The nature of the services that Multrees offer is very client intensive. They receive queries and requests from their investment manager clients on a daily basis and they needed a CRM that could monitor these client queries and record any open cases that needed resolving.

WORKBOOKS: A FLEXIBLE SOLUTION

Multrees Investor Services Ltd heard about Workbooks through word-of-mouth. When discussing why they chose Workbooks Clive explains, “We liked the fact that Workbooks were able to promise us a more tailored solution.

The product is made up of a number of components that you can adapt and use in a way that really works for your business, Our own company promise is to provide flexible, open architecture solutions and Workbooks seemed to mirror this ethos. It has provided us with open, accessible data.”

WORKBOOKS: AN AFFORDABLE SOLUTION

Clive went on to say that price was also a deciding factor: “Having been bombarded by consultants offering other CRM systems at a fairly high price it was welcoming to find a solution that was more economic for a young company that is rapidly growing. Yet we did not feel that we were having to compromise on the quality and functionality of the CRM system.”

PIPELINE MANAGEMENT

With Workbooks, the Multrees team is able to track all customer engagement. They now have complete visibility of the pipeline and can manage the progress of their opportunities.

Clive says, "We use the core CRM functionality in Workbooks for pipeline management. We store contact information, track opportunities and share information from client meetings. It has really given power and confidence to the entire team – if a client calls in, I can key their name into Workbooks and instantly see all the information relating to the person and I have all the details I need to resolve any queries."

STREAMLINED SUPPORT

Multrees Investor Services uses the Workbooks Outlook Connector alongside the case management functionality in Workbooks to manage the process from an initial support query through to the resolution of the support case.

Clive explains how the Outlook Connector and the case management functionality in Workbooks is vital to them: "If a client sends a query or question to the centralised support email address, Workbooks takes this and automatically creates a case in our Workbooks CRM system.

Each client has their own relationship manager and Workbooks enables the relationship managers to set up their own queues so that they only see the cases relating to their clients. This allows us to use a centralised support inbox, but also provides us with an efficient process that enables the relationship managers to deliver a very personal service to their clients."

Clive goes on to say, "Not only can we manage inbound queries that we receive from customers but we can also use Workbooks to track outbound queries that we send to vendors."

Multrees Investor Services plans to extend the functionality that they use in Workbooks to include the creation and posting of invoices. Clive explains, "It will be a huge advantage for us to be able to manage the full life cycle from the case, to the project work, to the invoice."

About

INDUSTRY

Finance

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

July 2012

TECHNOLOGY

- Workbooks CRM
- Workbooks Business
- Audit
- Outlook Connector
- Multi Currency

Contact Workbooks

EMAIL

sales@workbooks.com

PHONE

+44 (0) 118 303 0100

LINKEDIN

[linkedin.com/company/workbooks-com](https://www.linkedin.com/company/workbooks-com)

TWITTER

twitter.com/workbooks

WEBSITE

[workbooks.com](https://www.workbooks.com)