

Success Story

WORKBOOKS HAS ENABLED SMTA TO BECOME PROACTIVE RATHER THAN REACTIVE

Visibility and efficiency for all employees



“WHAT’S GREAT ABOUT WORKBOOKS IS THAT I AM NOT FORCING CHANGE, INSTEAD IT GIVES THE SMTA EMPLOYEES THE TOOL THEY NEED TO EMBRACE CHANGE AND MAKE THEIR JOBS MORE EFFICIENT.”

Malcolm McRobert - Business Development Manager at the SMTA

INTRO

The Scottish Motor Trade Association (SMTA) is the only trade association that exists to support motor trade businesses in Scotland. Established in 1903, the association aims to encourage, promote and protect the interests of their members, providing them with a number of services, offers and commercial opportunities that support the development and sustainability of their businesses.

SMTA’s members range from large motor groups with multiple branches, down to small MOT stations or repair workshops. Members pay an annual fee and in return they are able to use the recognised SMTA logo and access a range of services.

These services include; a Buying Group that provides members with reduced pricing on a number of Motor Trade products; Motor Trade Insurance; Employment Law advice; MOT Quality Control programme, support and representation. The SMTA also delivers apprentice training services and vehicle warranties.



ONE SYSTEM TO MONITOR ENGAGEMENT



IMPROVED MEMBERSHIP MANAGEMENT



MORE EFFICIENT MARKETING

FRAGMENTED DATA

Since its inception in 1903, the association has grown significantly. They had a number of fragmented systems in place across the businesses and each Group was unable to share information.

This became unworkable and was stalling commercial growth. Malcolm McRobert, Business Development Manager at the SMTA, explained, "The training arm of the business, Buying Group, Warranty Group and sales team were all using different, isolated systems. We needed one system that could be accessed by the whole organisation in which we could see how each part of the business was engaging with our members and in which we could store an exhaustive list of all the organisations involved in motor trade in Scotland, whether they were a member or not."

"THE BIGGEST CHALLENGE FOR US WAS GROWTH. IN ORDER FOR OUR ORGANISATION TO GROW, WE NEEDED TO TARGET OUR SALES AND MARKETING EFFORTS, BUT WITH DISPARATE SYSTEMS IN PLACE IT WAS DIFFICULT TO IDENTIFY WHO WOULD BE INTERESTED IN A PARTICULAR SERVICE OR PRODUCT. WE WANTED TO INCREASE OUR EFFICIENCY AND GIVE THE COMMERCIAL ACTIVITIES OF THE BUSINESS A BOOST."

Malcolm McRobert - Business Development Manager

FINDING THE RIGHT VENDOR

Malcolm reviewed the big vendors in the CRM market and after extensive research he narrowed it down to a shortlist of four vendors; SugarCRM, Microsoft Dynamics, Sage and Workbooks. In the end Malcolm explains why they chose Workbooks; "We were confident that Workbooks could do what we needed it to do and it was clear that the functionality would meet our requirements."

"WHAT REALLY STOOD OUT FOR US WAS THE VENDOR RELATIONSHIP THAT WORKBOOKS BUILT WITH US DURING THE SALES PROCESS. I RECEIVED SWIFT RESPONSES TO ALL MY QUESTIONS AND I GOT THE SENSE THAT EMBARKING ON A PROJECT WITH WORKBOOKS WOULD BE MORE OF A PARTNERSHIP. THE MICROSOFT RESELLER THAT I CONTACTED WAS NOT AS COMMUNICATIVE DURING THE SALES PROCESS AND ULTIMATELY I WAS CONCERNED THAT IT WOULD BE THE SAME DURING THE IMPLEMENTATION PROCESS OR IF I EVER HAD ANY QUERIES OR REQUESTS ONCE WE WERE A CUSTOMER."

Malcolm McRobert - Business Development Manager

SHARED SUCCESS

Malcolm went on to say that the 'cherry on the cake' for them was the Shared Success scheme that Workbooks offers: "It was reassuring to embark on a CRM project knowing that the vendor was so committed to achieving a successful outcome that they were willing to share the risk with us. The scheme meant that we only had to pay the full cost of the project if Workbooks met the goals that had been set at the beginning. This made selecting Workbooks an easy choice."

MANAGING MEMBERSHIP

With Workbooks, the SMTA now have a single view of member communication by each Group in the organisation. As well as contact information and member details, the SMTA are able to record information about the services that each member provides, such as MOT services or repair services.

IMPROVED SALES AND MARKETING

The SMTA is then able to identify which products or services might be of interest to that member in the future. For instance, the SMTA can quickly and easily search through the database to find all their members that provide MOT services and then send them information promoting the MOT support service that the SMTA provides. Malcolm explains, "With Workbooks we have an up-to-date and accessible record of the services that each of our members provide so that we can understand how SMTA can help them."

Malcolm goes on to say: "Our marketing and sales teams can drill down to the products and services that may be relevant to each member, and can then tailor their marketing and sales efforts accordingly. This makes the member experience more profitable as we are able to contact them with relevant offers and products that may help them - and it also makes our sales and marketing teams more efficient."

BECOMING PROACTIVE RATHER THAN REACTIVE

"Workbooks has broadened the view we have of our organisation and our member database. As an organisation we are now able to look at the database as a key tool to drive activity," says Malcolm. "We are now proactively targeting where we focus our sales and marketing efforts, and where we allocate resources, whereas previously we were being more reactive in our approach."

USER ADOPTION

"WHAT'S GREAT ABOUT WORKBOOKS IS THAT I AM NOT FORCING CHANGE, INSTEAD IT GIVES THE SMTA EMPLOYEES THE TOOL THEY NEED TO EMBRACE CHANGE AND TAKE OWNERSHIP OF HOW WORKBOOKS CAN HELP MAKE THEIR JOBS MORE EFFICIENT."

Malcolm McRobert - Business Development Manager

RECORDING DIFFERENT LEVELS OF MEMBERSHIP

Workbooks has also enabled the SMTA to easily keep track of the different types of members in their database.

For instance, they can create a record for a member that is a Managing Group and then have individual records in Workbooks for all the subsidiary branches that relate to the parent organisation. Alternatively they can record individual membership or associate membership.

MANAGING THE WARRANTY BUSINESS

SMTA are currently in the process of developing Workbooks to manage the warranty arm of the business.

The SMTA not only provide warranties on behalf of their members, but also manage the warranties. They therefore need a system from which they can easily report on a large database of cars and can easily add new products to a product database.

“PREVIOUSLY THE WARRANTY GROUP WERE USING A BESPOKE SYSTEM WHICH HAD NO FLEXIBILITY AND A POOR REPORTING TOOL. WORKBOOKS WILL GIVE US FLEXIBILITY ON HOW WE MANAGE BOTH THE ACCOUNTS TO WHOM WE SUPPLY THE WARRANTIES AND THE WARRANTIES THEMSELVES. WE WILL FINALLY BE IN FULL CONTROL OF OUR OWN DATA WHICH WILL ENABLE THE EFFICIENT MANAGEMENT OF EXISTING ACCOUNTS AND THE DEVELOPMENT OF NEW PRODUCT AREAS.”

Malcolm McRobert - Business Development Manager

About

INDUSTRY

Trade Association

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

October 2012

TECHNOLOGY

- Workbooks CRM
- Workbooks Business
- Audit
- Contract Management
- Outlook Connector

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