Success Story

WORKBOOKS SUPPORTS GROWTH OF ATLANTIC DATA SECURITY

Atlantic switches CRM to achieve better value at a 50% lower cost.

ATLANTIC DATA SECURITY

"THE RELATIONSHIP BETWEEN WORKBOOKS AND ATLANTIC IS RAPIDLY DELIVERING CLARITY FROM COMPLEXITY."

Rick Romkey – Principle of Atlantic Data Security

ATLANTIC DATA SECURITY

Since 2011, Atlantic Data Security has been delivering industry leading network security products and services to both large enterprises and SMB markets across the US. Solutions include perimeter security, server and database security, threat detection and desktop and mobile security.

After years of continued growth and expansion, Atlantic joined forces with IT security firm Netanium in April 2018, creating a premier cyber security solution provider in the US.

MANANGING COMPLEX RELATIONSHIPS BETWEEN ORGANIZATIONS

FASTER AND MORE ACCURATE REPORTING

CONNECTING SALES & MARKETING FOR GROWTH

CRM – WHERE DID IT ALL START?

The business had been using Salesforce to help manage its sales and marketing pipeline and its customer relationships, but felt that it was cost prohibitive and the support available was limited with poor communication. Romkey said, "we didn't think we were getting good value from our Salesforce solution so we started looking at other vendors", and as a result, the business chose to switch to Workbooks in April 2018.

Implementing Workbooks has enabled Atlantic to support its future growth plans by reducing costs, increasing functionality and giving it a single view of its customers on a unified platform, behind common practices and processes.

> "WITH WORKBOOKS, NOT ONLY ARE WE ACHIEVING SAVINGS ON OUR LICENSE FEES BUT SEEING MORE AND BETTER FUNCTIONALITY. THE SALES FORECASTING IS WAY BETTER THAN WHAT WE HAD WITH SALESFORCE. WORKBOOKS ALSO WORKED CLOSELY WITH US DURING IMPLEMENTATION SO WE DIDN'T HAVE TO DEAL WITH THIRD PARTY CONSULTANTS."

Rick Romkey - Principle, Atlantic Data Security

SUPERIOR FUNCTIONALITY

Atlantic was looking for a CRM platform to support the future growth of the business, and so the team was particularly drawn to Workbooks' order processing, invoicing and contract management functionality, which would join up its entire lead-to-cash process in one fully integrated solution.

The project began with the replacement of a ten-user Salesforce CRM implementation for sales automation. During the discovery phase, Atlantic acquired Netanium, which already had 12 people using Salesforce and Pardot B2B Marketing Automation software. Atlantic's users were mostly using Salesforce for quoting and reporting, so it was vital for the differing approaches to be integrated seamlessly during implementation.

The requirement was expanded to include Workbooks' email marketing tool, Web Analytics tool Web Insights, and Event Management to replace the existing Netanium functionality, as well as Workbooks' Mapping Module.

Upon switching to Workbooks, both businesses experienced improved functionality, better communication with the support team and superior ease of use.

Today, the marketing team uses Workbooks to manage prospect lists and coordinate events, and benefits from the tight integration with the email marketing tool for campaigns. Whilst, the sales team uses the system to manage leads, and opportunities and create quotes.

The management team has been most impressed with Workbooks' reporting capabilities which are "far superior to that offered by Salesforce", said Rick Romkey. He continued, "with some basic understanding, a few key employees were able to gather the data needed very easily and present it in customized dashboards for the people who needed it". It had previously been challenging to create reports in Salesforce without third party assistance.

SIX WEEK IMPLEMENTATION

Due to the imminent expiration of Atlantic's Salesforce licenses, the project had to be implemented in just six weeks.

The team initially ran a 20-day project in April 2018 focused on Atlantic's sales business needs, as this is the most critical area of the business. The project covered contact management, lead and campaign management, quote and sales management and pipeline reporting.

Workbooks consultants began by migrating the quote generation functionality; Atlantic was generating quotes using Salesforce and in order to ensure business continuity, this became the top priority. This included moving from multiple PDF templates in Salesforce to just one in Workbooks, with the logic embedded into the PDF so the user does not have to remember what type of template to use.

> **"IT ISN'T ROCKET SCIENCE TO NAVIGATE THROUGH WORKBOOKS ONCE YOU HAVE A BASIC UNDERSTANDING OF HOW IT WORKS", AND SO THE BUSINESS DIDN'T NEED TO INVEST IN A HUGE AMOUNT OF TRAINING.**

Rick Romkey - Principle, Atlantic Data Security

Further to this success, the business implemented the marketing side in September. This included setup and configuration of Workbooks' email marketing functionality, and involved migrating data from the two separate Salesforce solutions – including deduplication. Since this, Atlantic has been working with Workbooks to finetune the system to its exact needs.

To implement the software, Atlantic instructed two of their internal staff to act as subject matter experts, with one supporting sales and the other supporting marketing. The business' two principles were the main decision makers and others within sales and marketing tested the system.

The subject matter experts were most critical to the smooth implementation; they worked closely with Workbooks to communicate how Atlantic wanted the system to operate and the changes that needed to be made. Workbooks provided training to these experts who then trained the sales and marketing teams.

CHANGING HOW TEAMS GET THE JOB DONE

There was initial resistance from the sales and marketing teams as some of their core processes were being changed, impacting how they carry out their day-to-day activities and the systems they use. For example, Excel had been previously used to create quotes, so there were a few challenges in moving to a system where quotes would no longer be made in isolation, but be part of a lifecycle of a sales opportunity.

Therefore, strong backing from management was required to openly show support for the changes being made to the business, and to reassure staff that the changes were necessary to ensure the company remained as efficient and forward-thinking as possible. Such cultural shifts were needed to guarantee teams embraced the changes and fully adopted the new software into their daily work patterns. Rick said, "solid directive from management was needed to ensure Workbooks was being used properly and data was kept fresh and updated".

For those in the business who had been using Salesforce, there was the initial challenge of adjusting to new software.

Going forward, Atlantic wants to extend the processes which are managed through Workbooks to include order processing and invoicing.

BETTER VALUE FOR THE BUSINESS

Workbooks delivers significantly more functionality than the Salesforce solution at a cost that is 50% lower. For Atlantic, it has been transformative. Rick commented, "thanks to the increased functionality, we'll recoup implementation costs in less than two years and continue significant savings on license costs beyond that. And the improved functionality is producing results: it's rapidly delivering clarity from complexity."

The management team has seen significant benefits to the business as a result of using Workbooks. Most notably, it has enhanced decision making for managers; the reports created in Workbooks allow managers to stay up to date on the sales team's activities in real time, directly linking to the successes and failures of marketing for the sales team, in terms of which events are getting the most engagement. From a management perspective, this allows them to focus in on what teams are doing more closely. Rick adds that "it is valuable to have that visibility into the daily operations of the business, we didn't get that with Salesforce".

This has also resulted in reduced operational costs and enhanced processes in the sales team, as managers have a direct insight into their daily activities and so changes can be made where necessary, therefore increasing efficiency.

Rick concludes that Workbooks "has saved us a lot of money and we're getting the data we need out of it, that's all you can ask for".

About

INDUSTRY
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IMPLEMENTATION DATE
April 2018

TECHNOLOGY
- Workbooks Business Pro
- Contract management
- GatorMail
- Web Insights
- Event Management
- Mapping Module