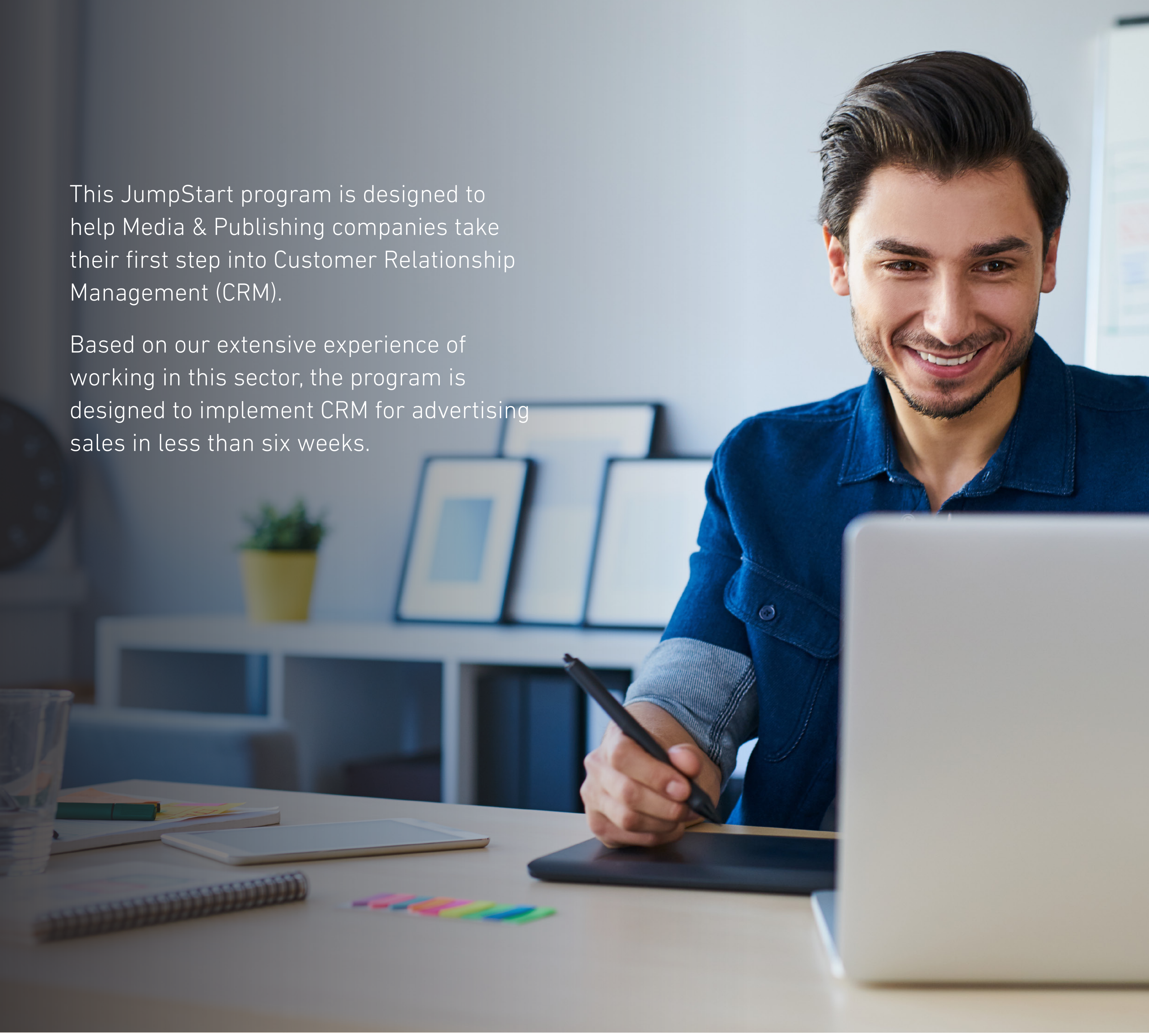
Workbooks.com

JumpStart for MEDIA & PUBLISHING

Contents

For further advice and guidance please contact Workbooks at **success-usa@workbooks.com** or call +1 860-438-6647.



This JumpStart program is designed to help Media & Publishing companies take their first step into Customer Relationship Management (CRM).

Based on our extensive experience of working in this sector, the program is designed to implement CRM for advertising sales in less than six weeks.

Once implemented, the Workbooks CRM platform can be used to enable your company to:

- Store information in a centralized database with all the organizations and people you do business with, and record the meetings, tasks, phone calls and emails with them to provide a 360° view of all your customers and prospects
- Record details of the deals your sales team are working on (including direct sales and those through advertising agencies), track your pipeline, produce a forecast and monitor salespeople's performance
- Produce quotes, process sales orders and hand them over to fulfillment, where they can be tracked and managed by the production team
- Manage inventory and rate cards – i.e. advertising options with standard costs and prices
- Display the performance of publications and events for each brand including orders received and page yield

The solution comprises a pre-built database designed especially for Media & Publishing companies. In addition, Workbooks will guide your project team and users through a simplified approach to implementing the CRM, loading your data and training your users to ensure the system is adopted and delivers value quickly.

JumpStart for Media & Publishing will deliver the following areas of functionality:

CENTRAL CUSTOMER AND PROSPECT DATABASE

A centralized database to store all the information about the organizations and people you do business with (or plan to do business with), including advertising agencies. These records include basic profiling fields to segment clients and prospects including job role, annual revenue, number of employees, and industry/sector, and hold the production and invoice contact details required by your fulfillment and finance teams.

Integration with Office 365 is supported, permitting emails to be pushed from Outlook and synchronized with Workbooks where they are stored against the relevant records in the CRM.

PIPELINE REPORTING

Your Workbooks database is also pre-configured with a record to manage sales opportunities, including all the reports you need to track your pipeline and produce a forecast.

It enables you to record the details of the deals your salespeople are working on, including:

- Close date, opportunity stage and percentage probability
- Organizations and people related to the opportunity
- Products to be sold, including standard pricing if appropriate
- Overall opportunity value and gross margin

All open opportunity records should have an activity record, describing the next step in the process with an appropriate due date. This combination of opportunity and activity records is what drives the process to ensure all deals are being proactively followed-up.

The sales dashboard provides an overview for each salesperson on their activities and pipeline. It includes the following reports:

- My opportunities and activities, sorted by due date (action report)
- My achievement against target
- My pipeline, by stage, by month or quarter
- My opportunities with no next step or overdue activity (exception report)

The sales management dashboard provides an insight into movement within the pipeline and is designed to ensure users are adopting the CRM solution appropriately. It includes the following reports:

- Activities and opportunities created by week/month
- Emails sent by week/month
- New opportunities to stage one (pipeline)
- Pipeline by deal size (small, medium, large)
- Performance (closed won opportunities) by month or quarter, against target, by salesperson
- Conversion rate by salesperson for the year
- Opportunities lost this month
- Opportunities qualified out this month
- Lost and qualified-out opportunities summarised by lost/qualified-out category

BRAND PERFORMANCE

This dashboard provides further insight into the activity and performance of your sales team and the impact on each brand:

- Performance (closed won opportunities) per brand in the current financial year, split by category – i.e. print and digital/online
- Sales orders received (those that have been approved by the client), grouped by publication, split by category
- Invoices raised (draft and completed), grouped by publication

PUBLICATION PERFORMANCE

The database enables publications to be set-up quickly and in bulk with all the key information including brand and key dates. This dashboard will display the following reports on a publication-by-publication basis:

- Pipeline by salesperson, split by sales stage
- Performance (closed won opportunities and sales orders received) by salesperson
- Performance this financial year against the corresponding publication last financial year
- Invoices raised (draft and completed)
- Inventory – i.e. the quantity available of key positions, such as the inside front cover
- Page yield (pages sold/order value)

PRODUCTION PERFORMANCE

To facilitate the handover of sales orders to your fulfillment team the database will include a process automation script. This will automatically create a production case record for each line item on a completed sales order, automatically assigned to the team's queue and populating the following fields:

- Brand
- Event/publication name and date (as well as the date for copy)
- Product name/specification
- Price
- Status

Furthermore, an additional script will automatically send an email request for copy/artwork to the customer's nominated production contact as well as a series of reminders, until such point it has been received.

The production dashboard can then be used to monitor individual caseloads and deadlines for artwork and publication.

FINANCIAL PERFORMANCE

The finance dashboard will provide this team with the following reports:

- Orders in progress (approved and partly invoiced)
- Draft invoices for each event and publication, split by brand
- Posted invoices for each event and publication, split by brand

OUTPUT DOCUMENTS

The database will also include a single PDF template for each transaction document – i.e. quotation, order, invoice and credit note. Each template will automatically use the correct brand logo based on the value set by the user in the document and provide the option to hide or display product components.

IMPLEMENTATION *approach*

Our 'JumpStart for Media & Publishing' implementation is a 15-day engagement with Workbooks, comprising:

- An initial 1-day 'kick-off' to walk-through the out-of-the-box solution and gather additional requirements
- Four days to perform the additional configuration of the database (based on the initial workshop)
- Two days to configure your PDFs
- Three days to import your data, including sales leads, organizations, people, planned events and publications, open opportunities and historical transaction documents (NB this will need to be provided in CSV files, in a format specified by Workbooks)
- Five days to train and enable the various teams (sales, production and finance) and support the go-live process

A typical timetable will be as follows:

Timeframe	Activity	Description
Day 1	Project kick-off	Typically held at your premises, this workshop is designed to kick-off the implementation process, agree roles and responsibilities, and schedule the project's key milestones. Thereafter we will walk-through the solution with the core project team and agree any minor configuration changes to the database – e.g. picklist values, custom fields and so on.
Days 2 to 5	Configuration – core system	Setup of Workbooks following the initial workshop, including any custom fields and picklist values agreed.
Days 6 to 7	Configuration – PDFs	Customization – i.e. company branding and business logic of the PDF templates to support sending details of quotations, orders, invoices and credit notes to customers by email.
Days 8 to 10	Data Migration	Once your data team has populated the templates provided by Workbooks these can be shared with your Implementation Consultant to perform the imports.
Days 11 to 15	Training and Enablement	Workbooks will deliver basic training to all end users as well as specific sessions to each team – i.e. sales, production and finance. In addition to these classroom-based courses, time will be allocated to support go-live, including floor-walking and telephone support.

PREREQUISITES

The following information will be required prior to the project kick-off to ensure there are no major delays:

- Brand logos
- Terms & conditions
- Bank details
- Transaction currencies
- Data files for sales leads, organizations, people, planned events and publications, open opportunities and historical transaction documents
- Rate cards

PROJECT *scope & cost*

PROJECT SCOPE

The scope of the 'JumpStart for Media & Publishing' implementation defined in this document is for the following record types:

- Sales leads
- Organization records
- People records (connected as employees to organizations)
- Publications and event records
- Products
- Opportunity records + line items
- Transaction documents (quote, order, invoice and credit notes) + line items

All other record types are excluded from the scope but may be included if the customer purchases additional consultancy days.

The customer is responsible for populating the Excel templates Workbooks provides with the necessary data for import. Customers should take care to ensure the templates are correctly populated and fields validated.

PROGRAM COSTS

The total cost for the 'JumpStart for Media & Publishing' program is 15 days of consultancy at a cost of $19,950 + Sales Tax + Expenses (charged in line with our standard policy, set out in our **terms of service**).

PROGRAM OPTIONS

In addition to the scope defined above Workbooks can provide the following options:

- System Administrator Training @ $1,400 per person for a two-day course: A great way to learn how to configure and maintain your Workbooks system. We recommend at least one person in your organization attends.
- Reporting Training @ $1,400 per person for a two-day course: An introduction to all the main features and functions of Workbooks reporting and dashboards. We recommend that all customers have at least one person in their business who is familiar with reporting.