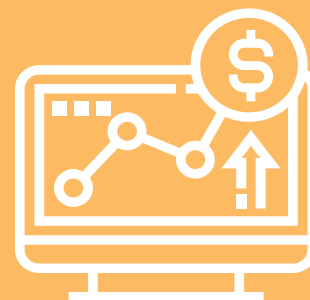


CRM IN IT *Success Story*



A leading IT solutions provider offering a cloud collaboration platform went live with Workbooks CRM in 2010. As a customer in its 10th year of working with Workbooks, the business has been able to adapt the system to its needs as it has grown and changed over the years.



WHERE DID IT ALL START

As a tech provider with a business and brand to build, CRM has always been integral to the customer's success story. In the early days, the business evaluated a number of CRM solutions, which didn't quite fit the bill, including Microsoft Dynamics.

The Sales and Marketing Director commented, "We didn't find Microsoft Dynamics particularly good at managing relationships between organizations, each with different business units and various contacts within each. It was a nightmare to navigate and manage the numerous sales contacts, contracts and licenses. We needed to find another solution fast as our business was growing in scale and complexity".

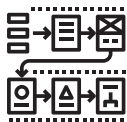
Workbooks had some stand-out qualities that impressed the management team, and a demonstration showed it to be logical, straightforward and easy to use.



SIMPLIFYING COMPLEXITY, FACILITATING SCALE

In particular, the relationship customization function appealed to the customer. The structure of its clients' organizations and the network of different business areas, contacts and relationships with external organizations is highly complex - when you consider the associated contracts, renewals, quotes and licenses, it is clear the connections need to be mapped. The design of Workbooks CRM allows the customer to do this.

As the Director said, "A Software as a Service (SaaS) environment is very dynamic and you need a multi-dimensional tool to map the complexity, from lead and pipeline management to quote and order management, through to contract control and renewal reminders. Workbooks enables us to map our client organizations, which helps us manage our own financial operation. When we were pulling information from multiple spreadsheets to see who needed to be invoiced and when, the whole process was much more time consuming and prone to errors."



CHAMPIONING AUTOMATION

Automation has always been a key driver for the customer. The plan was to remove as many touch points from the sales process as possible, to free up the sales team to focus on more strategic tasks and to improve profitability. The customer realized the more elements that could be automated, the more scalable it would be.

As the business is a SaaS model, managing contracts, renewals and quotes could be a headache, but because Workbooks automates renewal notices, invoice generation and documents contract finalization, it is a seamless process.

Reporting has also dramatically improved. The monthly report used to take the sales team four hours to complete, but now the reporting templates are set up in Workbooks and data can be extracted directly, the process has been reduced to less than 30 minutes - almost a 90% reduction in time.



TAKING SALES AND MARKETING TO ANOTHER LEVEL

CRM has been invaluable to the sales team. It has helped them embed a new business process, incorporating best practice and integration with the marketing function. The team is currently working with Workbooks to improve the management information derived from the system and enable visibility across the whole sales cycle. The aim is for them to be able to analyze what's happening across the pipeline, assess conversion rates, the win/loss ratio and where deals are in the cycle. And importantly, it will allow the team to make forecasts

on lead generation, conversion ratios and sales revenue.

Workbooks has also significantly improved marketing operations with its integrated marketing automation and lead generation suite, powered by Communigator. Previously, all data was held in Hubspot and there was no integration with the CRM function, meaning marketing and sales activities were disjointed. The launch of a new website promoted the business to move everything on to one platform so data would be held in one place and it would provide an accurate and reliable 'single source of truth'. It also enabled the company to perform lead management, sales, invoicing and renewals using one system. What's more, the team can now set up onboarding emails and have visibility of all marketing communications activity within Workbooks - at a glance, the team can check data on click throughs, opens, unsubscribes etc.



MORE THAN A VENDOR

The Director concludes, "Culturally, Workbooks is very similar. Like us they are a high-growth tech business and have always understood our ambition. It hasn't just been about technology - they have helped us develop a CRM mentality that has helped hone our sales approach and achieve our growth objectives. They are a true partner."

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