

# APL Media joins up its business with Workbooks CRM



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**MATT MIDWORTH**

COMMERCIAL DIRECTOR, APL MEDIA

As Commercial Director, Matt Midworth manages APL Media’s sales team of 35 people, together with the sales process that supports them in contacting and booking clients.

“Ultimately, success at APL Media comes down to sales figures,” explains Matt. “It’s about maximising revenues across all our different revenue streams – what we’re generating in sales on a daily, weekly, monthly basis, whether that’s newspaper supplements, magazines or events.”

Four years ago, the CRM system at APL Media was very limited in its usage – the sales team used the system for order processing, but, crucially for Matt and the senior management team, it lacked the ability to integrate with APL’s finance and production teams.



**Better control of the entire lead-to-cash process with a single integrated system**



**Improved real-time visibility of all activity throughout the sales process**



**Reduced lead time with all production information available on order records**

“That meant we still had to print off orders when they were received and get those manually processed in other departments,” Matt recalls. “Another issue was that it wasn’t easy to get good data out of the system in terms of reporting because it was very much just a simple database.”

In being able to take advantage of the opportunities offered by the ever-evolving world of digital publishing, Matt and APL Media Managing Director Matthew Jackson led the search for a new CRM and quickly whittled it down to two – Workbooks and Salesforce.

“We wanted to integrate all areas of the business in order to future proof everything, so that it would be effective in doing things that we hadn’t even started doing at the time,” explains Matt. “Email marketing was an example of that, where we wanted to be able to have a dialogue with our clients by being able to use our database more effectively.

“Cost effectiveness came into it, obviously, but what was really important to us was flexibility so that we could tailor something specifically to what we do and our processes,” recalls Matt. “We wanted someone small enough that we could tailor our own version of it, but big enough that we weren’t reinventing the wheel the whole time.”

As part of the selection process, Workbooks took Matt, Matthew, and the rest of the senior management team through its Shared Success workshop, which helped them define the outcomes they wanted to achieve with CRM.

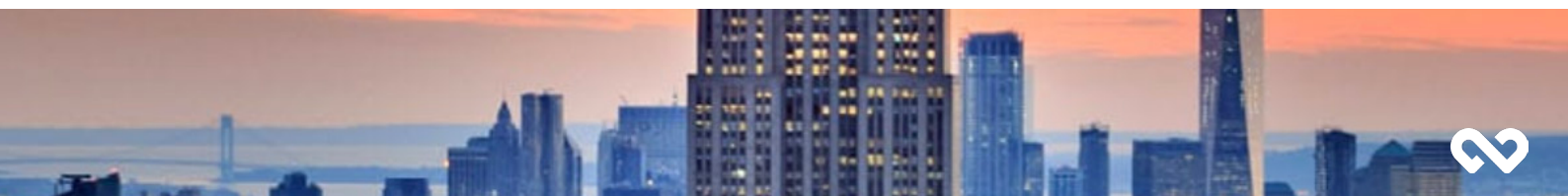
“One of the things that came out of the workshop was that we were spending around £18K a year just printing out orders, which was definitely an eye-opener for us,” says Matt.

“Once we’d agreed what we wanted to achieve together as a business, we then had a much clearer idea of what each department wanted to improve,” he continues, “together with a really very detailed understanding of how CRM software could help us to achieve those outcomes.”

“This meant that even before we’d invested in any software, Workbooks had helped us develop a clear strategy that was not only aligned to our goals as a business, but also gave us a detailed plan for carrying it out.”

“The workshop really was representative of the attention to detail that Workbooks paid to us throughout the whole process,” explains Matt. “The time they took to understand what we needed and how we could achieve it was a big factor in choosing Workbooks – it made us feel confident that they understood our business and that what they’d proposed was tailored to our needs.”

“Price was also a big factor in choosing Workbooks,” admits Matt, “but more important was the knowledge that we would be working in partnership, as opposed to being a customer – that we could grow with the software and adapt it in collaboration with the company.”



# HOW DID WORKBOOKS HELP?

In their original implementation, APL Media decided to go purely with the sales and production teams working hand in hand.

“As soon as we began processing all of our orders through Workbooks instead of printing them out, we cut costs immediately just by removing paper from the process.”

“This means that as soon as we get a new lead, we can see everything right through to the moment we send the invoice.”

“And for our sales team, this means when they get an order, the customer can sign it digitally, which cuts down the time it takes to get an order signed and lets them move onto another booking more quickly.”

“Being able to sign orders digitally gives us more traceability as a business,” continues Matt, “but it also gives our sales team and our customers the assurance that their order has been processed.”

“From my point of view as Commercial Director, I can see everything my team is doing, everything they’re booking, as they’re booking it, which means I don’t have to waste time trying to understand where we are in terms of revenue and what we’ve sold.”

But it’s not only the sales team that have benefited from Workbooks, as Matt explains:

“In terms of understanding what our customers have ordered, our Production team can see everything that they then need to deliver because all the information that the customer has given us is on the order record.”

“This means that production don’t have to chase sales to find out what they’ve booked. This frees up the production team’s time so that they can focus on delivery, but it also frees up more of the sales team’s time because they don’t have to waste time relaying what they’ve sold to Production.”



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“Our sales and production teams are still using Workbooks at APL Media, but our use of the system has also deepened over the last few years,” observes Matt. “We’re doing a lot more email marketing and one area that’s really deepened over the last few months is in terms of bringing data into the system and then communicating with those people using Workbooks and Spotler.”

Justin Amoa is APL Media’s email and CRM manager:

“Workbooks helps us make sure that our data is clean and of good quality and that the information that we get from reports is accurate. If we focus on doing the small things correctly, it allows us to do the big things correctly.”

“When we’re importing data, the reports we’ve set up definitely help make sure we have the right information, the right email addresses,” continues Justin, “so that when we’re sending out marketing emails we get a better response and a better ROI.”

“Workbooks is definitely valuable to us, both in terms of the growth in the database and in terms of its management,” says Matt. “It generates response, which generates revenue – now, we’re trying to implement how we measure that to make sure that we can quantify every email that goes out in terms of bookings against it.”

“The value that the sales team get from Workbooks is being able to see all of the information in one place, as well as being able to see their colleagues’ information,” comments Justin. “Having the right information in Workbooks is key as well, because it means our sales team can be more efficient with their time – and in publishing, time is of the essence.”

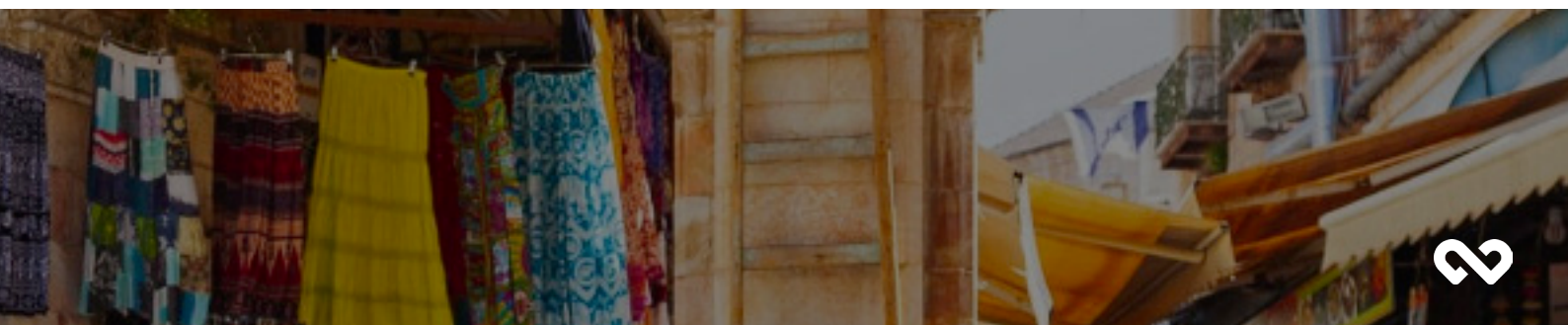
Justin continues: “Being able to have the right data quality is so important, but maintaining that quality is really important as well.”



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**JUSTIN AMOA**

EMAIL & CRM MANAGER, APL MEDIA



“For example, we’re now able to manage our Do Not Call list more effectively, so we can avoid contacting people who have asked us not to contact them. That saves valuable time as well as maintaining our reputation, which is really important for us.”

What does the future hold for Workbooks at APL Media? Matt is confident: “As soon as we can integrate Finance with Sales and Production, then integrating and streamlining that whole process, having different departments being able to access the same information about clients will be really valuable, and we’re on the way to being there.”

“Once we’ve got it running smoothly across all departments, it’s about continuing to cleanse and build the database,” adds Justin. “Once we’ve done that, we can get strategic marketing in place that’s as much about engaging and keeping in touch with our customer base as it is about selling – that’s really important.”

“For the travel side of our business, my vision is of a database that will cover every destination in the world and have all the key players from those destinations,” concludes Matt. “We can then reach out to those people with branded engagement, rather than a sales pitch and Workbooks is instrumental in achieving that vision.”

# ABOUT APL MEDIA

APL Media is an award-winning London-based agency that specialises in creating multi-channel content for consumer and trade audiences, primarily in the travel and lifestyle sectors.

As the UK partner of the National Geographic Society, APL Media publishes National Geographic Traveller and National Geographic Traveller Food in the UK.

In managing several global brands, APL Media uses its expertise to create content, websites, social media campaigns, events and video as part of its marketing strategies. Additionally, its branded content division excels at crafting innovative campaigns.

The team at APL Media produces magazines, directories, inserts, newspaper lifestyle guides, special reports, one-off guides and bookazines, all supported digitally, and its events range from prestigious industry awards to food festivals and reader experiences.

