



Workbooks.com

Case Study

# SECUREWEST

A CRM implementation  
that delivered ROI fast



Implementing Workbooks was the first thing I did at Securewest, and it's paid dividends. This has given us better foundations and in general it's been a really, really, good decision for me and the business.

**ANDREW GIBBENS**

**Global Director of  
Business Development**

## INTRO

Securewest has been providing risk management solutions, consultancy services and training to customers across the globe for more than 30 years. It helps organizations from charities to universities, maritime organizations to blue chip multinationals, prepare for, safeguard against and respond to risk when they travel overseas.

It does this through a combination of pre-visit risk assessments, traveller training, an app providing urgent information – such as push notifications of events like an imminent hurricane, or an unfolding terrorist incident – to travellers, and the ability to intervene in particularly critical situations via a 24-hour global response center.



**Increased sales**



**A clear view of  
customer journey**



**Better business insights**

# THE NEED FOR CRM

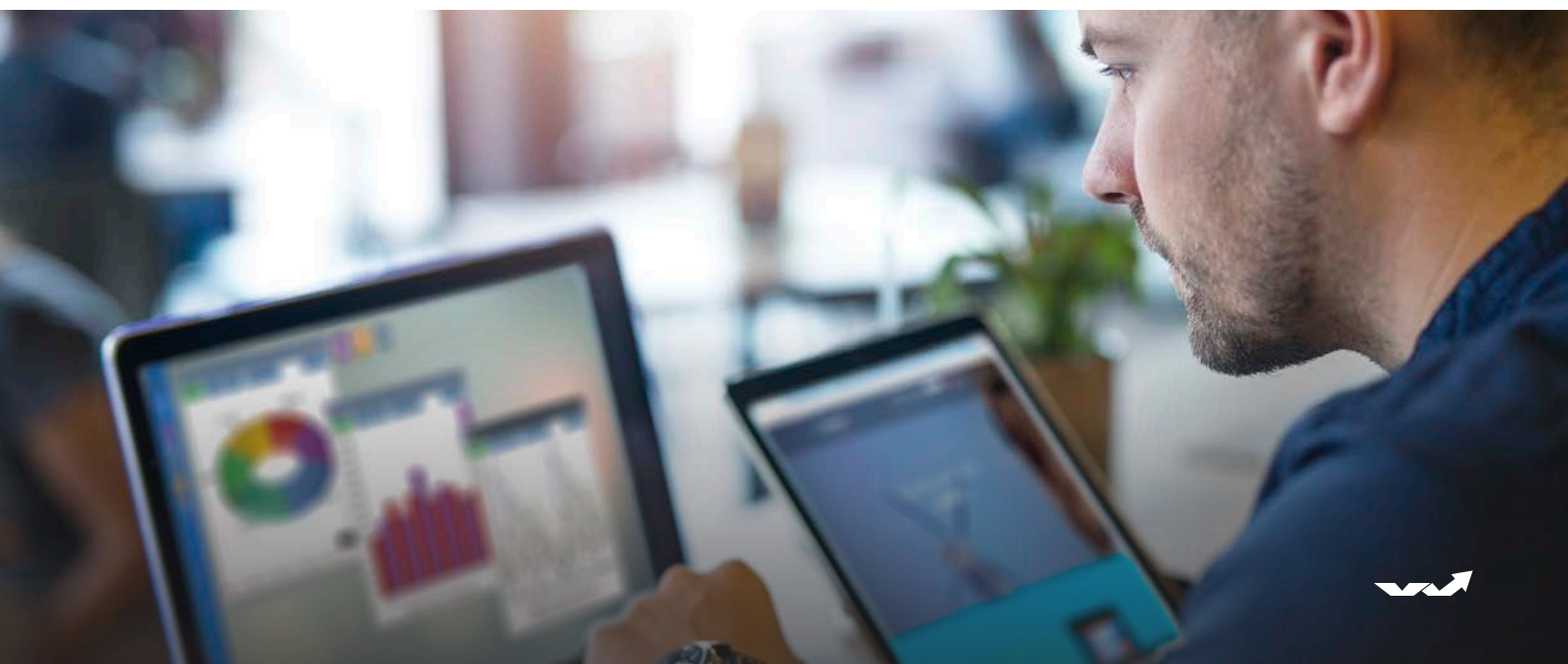
Andrew Gibbens joined the company as Global Director of Business Development in September 2019, and one of his first priorities was the selection and implementation of a CRM platform. With plans to accelerate growth within the business but a disjointed process and a system not fit for purpose “We needed to get a clearer view of our customer journey and find ways to enhance that journey,” he explains. “We only had a database with names and addresses but salespeople weren’t really using it.”

Perhaps the most significant issue was that customers could have an urgent need for a risk assessment as they were moving say a cargo ship or an oil rig to a different location in the world, so they’d call the global response center which would prepare one, but then the finance team may not be aware that work had happened and wouldn’t know to raise an invoice for it.



Having worked with CRM in previous roles, I knew there was a real opportunity at Securewest to use CRM not only to create a more positive engagement with customers - one that would be better aligned to the way people do business, but also to help increase revenue for the business.

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# SELECTING A VENDOR THAT CARED

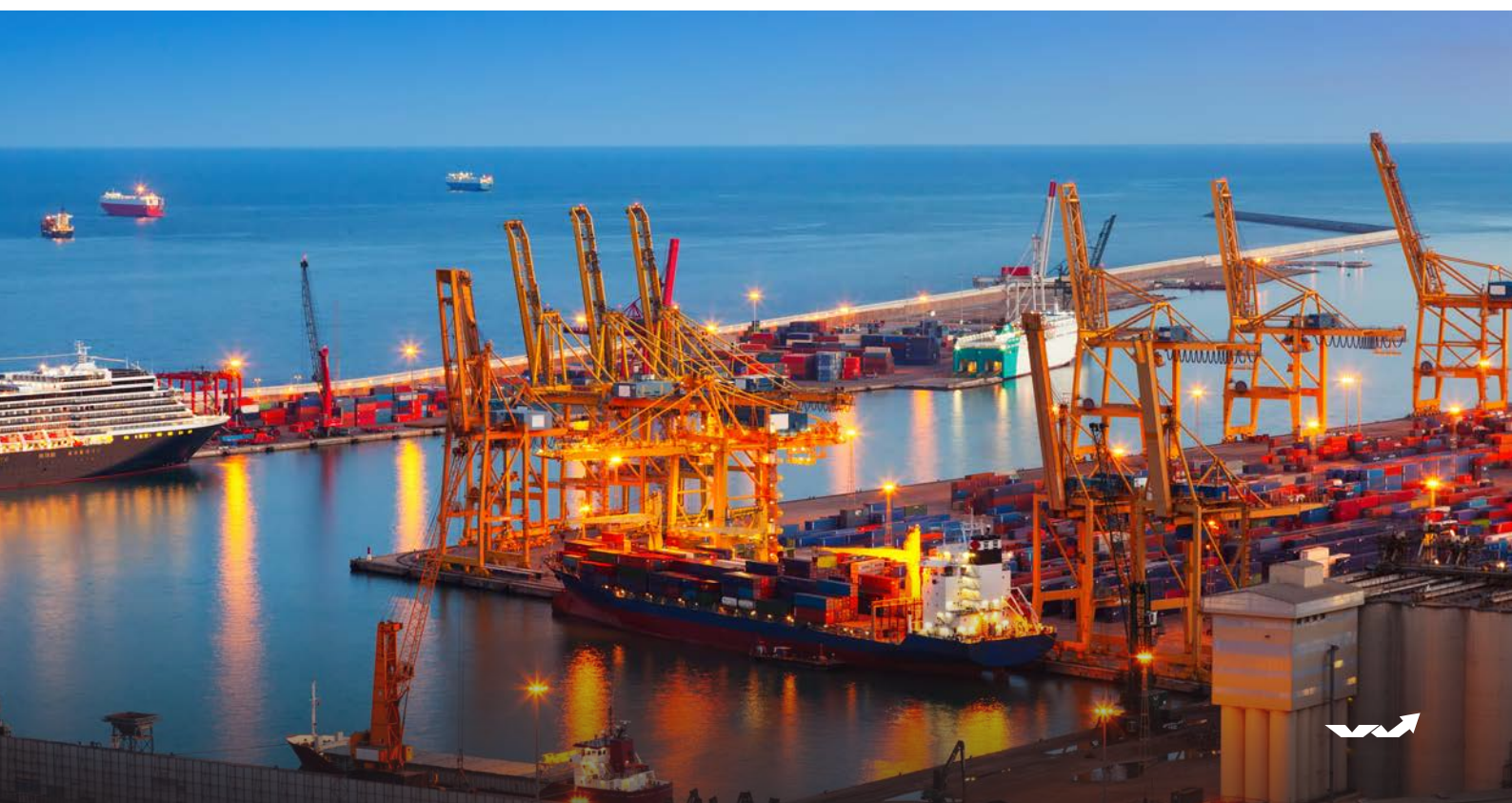
He started the selection process by arranging demos from three vendors, and gave all three the same generic questions. Internally they decided how many licenses they would need and then began a process of active collaboration with those who'd be using it and paying for it – the sales and executive teams.

At that stage they were able to dismiss one option as lacking the functionality Securewest was looking for, and then make a final choice based on cost, and chemistry with the team. Gibbens reports that the attitude of the Workbooks team was a major factor for them.



We'll never be one of Workbooks's biggest customers, but the only way I can describe it was they 'cared', they made us feel like we were important to them. That combined with the flexibility of the Workbooks platform meant this was in the end a very easy decision to make. I'd used Workbooks in a previous role and was sure it would be the right choice for us.

**ANDREW GIBBENS**  
Global Director of  
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# RAPID IMPLEMENTATION

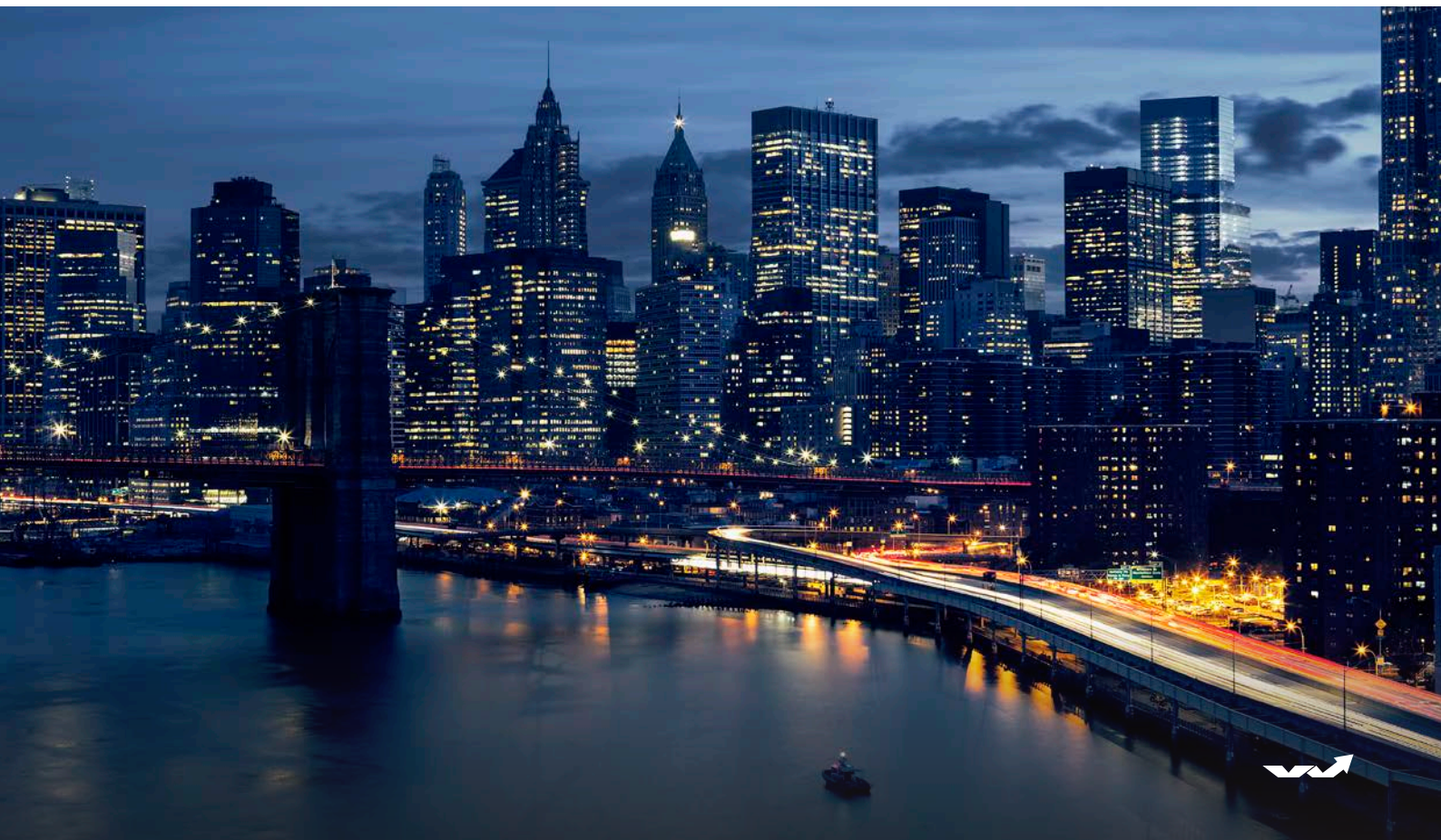
His prediction turned out to be correct. That selection process took just six weeks, and they managed to complete the implementation phase in the same amount of time. It began with a Workbooks Jumpstart session, a quick start methodology with an on-boarding manager to guide the team through the process, enabling Securewest to get value from CRM as soon as possible. Then Andrew and his team ran the data import and built the system to the point where everything was working. Once that was completed, they launched the CRM system with the sales team.

A year on, all of its sales and marketing functions now run on Workbooks CRM.



We've created a joint platform for sales and marketing on Workbooks. All our marketing data is on there, all our campaigns are run through it, and we have that single, clear view of the customer journey.

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Global Director of  
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# CONCRETE, EARLY BENEFITS

Despite some of the development being postponed as a result of the COVID-19 pandemic, Securewest is already able to see commercial benefits. Specifically, automation of processes has meant that the global response team now bills for all of the work it does for clients. Sales have risen 12-15% as a result.

Andrew says “ The executive team, my team and I can now get insight from Workbooks on pretty much everything, from pipeline to won/lost analysis to marketing campaign results”. Securewest hope to soon automate their data import with an API and to integrate their finance systems putting Workbooks CRM right and truly at the heart of their business.



The flexibility and agility of Workbooks has enabled us to bring the sales and marketing functions together. Our partnership with Workbooks means that we're now on a far firmer footing than we were 12 months ago.

**ANDREW GIBBENS**  
Global Director of  
Business Development

## ABOUT

### INDUSTRY

Business Services

### IMPLEMENTATION DATE

December 2019

### TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Exchange Server
- Gatormail/Spotler
- Web Insights

