



Workbooks.com

Case Study

TCMM SHUTTER GROUP LTD

CRM pivotal to enabling an agile business transformation.

TCMM shutter group

We may not have started on our CRM journey expecting Workbooks to become the platform we'd run the business on, but that's where we've got to, and the efficiencies and insights that it's generated have been transformational.

SAM TAMLYN

TCMM Operations Director

INTRO

The TCMM Shutter Group is one of UK's the leading providers of interior window shutters. Based in Brighton, it has a global reach, and is made up of five brands: Shutterly Fabulous; California Shutters; DIY Shutters; The Shutter Store and Carter & Clark.

TCMM implemented Workbooks in November 2017, originally using it to support remote sales consultants working for Shutterly Fabulous. However, by November 2019 TCMM had broadened the use of Workbooks across the organization in order to enable a far wider range of benefits. It's giving the team far greater insight into the business, and has not only streamlined the way it works, but it has also enabled TCMM to pivot rapidly to a more digitally focused offering during the COVID-19 pandemic.



360 degree view of customers



Increased conversion rates



Better business insights

REVENUES INCREASED BY £1M (\$1.4M)

Founded in 2002, by 2017 TCMM was trying to run its business on multiple systems, such as OpenCRM & Kentico plus a multitude of spreadsheets, and the lack of control over its data was holding the firm back. Colin Williams, Head of Sales, had worked with CRM in the past and saw the opportunity to implement a system across TCMM.

After a rigorous selection process where other solutions such as Salesforce & Zoho were assessed, Workbooks was appointed. The initial plan was to use it for the Shutterly Fabulous brand to make selecting the best consultant to visit a customer easier, and to allow the consultants to create accurate quotes during visits so customers could sign up and pay a deposit there and then.

Sam Tamlyn, Operations Director, reports that the original objective has been met. TCMM's network of roughly 40 field consultants can now input a customer's requirements into the system while they're with that customer. There is far less chance of input error, and there has been a major time saving, by removing many of the manual processes for getting a quote to a customer and the order approved.

Finally, the system can record which windows within a customer's home are still without shutters, giving the company an opportunity to be more segmented in their marketing approach, to keep in touch with existing customers and to sell to them again in the future.

Sales have grown by £1m (\$1.4m), thanks to a 15% increase in conversion rates on customer visits.



GREATER EFFICIENCIES

TCMM is a complex business. Firstly, there are a great many ways to configure shutters. Then there is the fact that they have five brands and they sell shutters in three different ways: sales agents visiting customer homes; white labelled shutters for example through the high-end UK department store, John Lewis; and for those who can fit the shutters themselves TCMM has an online offering.

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Using a single platform enables TCMM to get a unified view of the business, and this gives the team far greater control and insight both at a high level but also in granular detail. We now know how well the team is performing and have been able to become more digitally focused.

VICKY BIBBY

**TCMM Digital Development
Manager**

Workbooks CRM is saving the TCMM team time. Whether that's people no longer standing next to printers – the firm used to print out everything in the quote process – or the fact they now have so much more data at their fingertips they can make quicker, better decisions, Workbooks has made TCMM a more efficient and profitable business.

The result is that revenue growth has been achieved whilst the firm's headcount has remained the same.



GREATER CONTROL AND INSIGHT

Everything is now held in Workbooks. Vicky Bibby, Digital Development Manager, says: "Almost immediately it eliminated the need to use Kentico, the online portal which managed orders from retailers, which was expensive to maintain and complicated. But that was just the start. We're continually evolving the system, so Workbooks CRM now manages everything from shipping through to customer communications to consultant commission calculations. Even invoicing is now integrated via Sagelink."

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Last night someone wanted to know how many different types of legacy white colour paints we were using. Without Workbooks we'd have been looking through piles of paper. With Workbooks we could create a report in minutes. The system is very easy to use or I can call Workbooks support and they are extremely helpful.

VICKY BIBBY

**TCMM Digital Development
Manager**

In terms of insight, Workbooks CRM gives TCMM visibility over the entire process. They can now easily produce overview reports, grouping problems together and looking for patterns or to help prevent problems reoccurring. For example, if a number of customers are reporting products arriving damaged following shipping from abroad the customer service team can look through Workbooks and assess the cause of the problem, whether that is a particular shipment or maybe the packaging used and act on this information.



CRM IS A JOURNEY

Looking back, the team at TCMM offers two pieces of advice to businesses starting out on their CRM journey: be patient and see the full potential. "CRM isn't a quick win," says Tamlyn. "You have to be prepared to invest time. And beware the obvious route of seeing it as just a sales tool. As we've discovered, it can be so much more than that."

TCMM has come a long way on its CRM journey, but it sees how much further it can still go.



I didn't expect we'd be able to use CRM for the entire end-to-end process with a business as complex as ours, but now Workbooks is integrated into everything we do. However, we're still only halfway through our journey. There's so much more we can do.

SAM TAMLYN

TCMM Operations Director

He concludes: "We had been in business 15 years and were using sticky plaster solutions. We took a leap of faith, made an investment in Workbooks, and it's paid off. Whatever we've needed to do Workbooks has delivered, and as we continue on our journey, I'm sure Workbooks will continue to be there for us."

ABOUT

INDUSTRY

Retail

NUMBER OF EMPLOYEES

50

IMPLEMENTATION DATE

November 2017

TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Professional
- Workbooks Outlooks Plug-in
- Workbooks Exchange Server
- Workbooks Mapping Module
- Spotler Marketing Automation Suite

