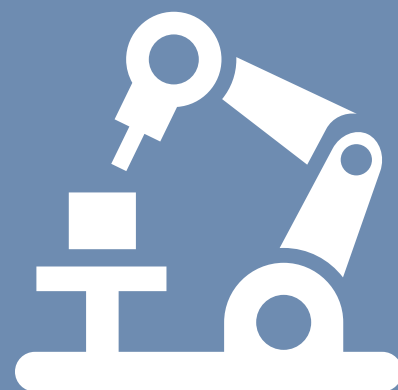
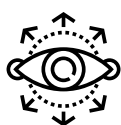


CRM IN MANUFACTURING

Success Story



A manufacturing firm, specializing in customized high performance polyethylene packaging, implemented their first CRM system in 2018 – Workbooks. Beginning the project in February that year and going live in April, the system has yielded significant benefits for the firm and opened up worthwhile opportunities for the future.



GAINING VISIBILITY

The business decided they needed a CRM for two distinct reasons: “in selling a consumable product, most of our business is repeat business and many of our core clients make a monthly order. When they pick up the phone to us we need to know who they are, what they’ve ordered before, and so on. We needed a central database to hold all that data.”

“Keeping all the information in one place would be a major step forward, but we also needed a system that would allow us to manage the pipeline of opportunities. Whilst some of our leads come through website enquiries or referrals, many come through outbound lead generation. CRM would allow us to track these leads, from lead to opportunity to quote to order, **giving us better visibility of future new business.**”

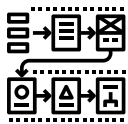


THE RIGHT PROVIDER

After reviewing a number of CRM systems, the team chose Workbooks: “as we are not a huge company, it was important for us to **work with a company where we knew the people and they knew us.** A global corporate vendor didn’t feel quite right. In the end, we chose Workbooks because it was easy to use and would give us all the functionality we needed.”

Workbooks came in to spend a day training the team on the system and were able to take the materials provided by Workbooks to create a user manual. The team could then begin to extract data from other systems such as accounting software, people’s individual Outlook, and so on.

The CEO says: “**The process was easier than we expected.** Using spreadsheets, we consolidated all of the data across the business. It only took two weeks to populate the system with all the names, addresses, emails, phone numbers, relevant documents and so on for our 700 customers. And then we were ready to go.”



DELIVERING TO PLAN

The business has already achieved its initial objectives of recording customer interactions and providing pipeline visibility.

The sales team is able to log all customer interactions on Workbooks, so even if one of the team is ill or on holiday or out with a customer, a colleague can speak to their customer and be up to date with their contact information, order history, service preferences and so on. The company can also track new business from lead to opportunity to quote to order, which gives them better visibility of future new business so they can plan resources better.

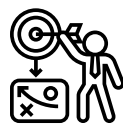
The Sales Manager says: "it is allowing us to allocate tasks within the sales team; we have an email alert that goes out every Monday morning showing each person their open opportunities and quotes where they've had no response. In the past it was easy to forget about quotes, but this has tightened up the process. We used to have overloaded external people and underused internal people, but **Workbooks CRM allows us to allocate our sales resource much more effectively.**"



MORE EFFICIENT PROCESSES, ULTIMATELY SAVING TIME AND INCREASING PRODUCTIVITY

Workbooks is delivering additional benefits for the Marketing Manager: "we launched a new website in December and website enquiries used to go straight into an inbox - managing them was time consuming and inefficient. Now they go straight into Workbooks, so the team can track and respond to them much more rapidly. This has really **helped us to get on to our enquiries more quickly - which is critical in today's fast-paced world.** It also gives us a better idea of how well our online advertising is working, **helping us make better future decisions on marketing investment**".

Workbooks has also accelerated the quoting process, reducing it from a multi-step process that took **15 to 20 minutes to a simple process that takes just three to four minutes.** This is a tremendous saving for the business.



FUTURE DEVELOPMENTS

The business deliberately began with a simple implementation of Workbooks. Now it is running smoothly, greater functionality is being added; work has begun to automatically convert quotes in Workbooks into an order, which is integrated with the firm's accounting software, further streamlining that process.

The CEO explains: "I envisage us reaching the point where all customer-facing parts of the business operate out of Workbooks. It would be really beneficial in terms of reducing our costs and increasing efficiency. Customer experience is becoming a major differentiator, and **Workbooks helps us provide a better experience for our customers.**"

Workbooks is also providing an enhanced experience for staff; the best example of this is the story of a member of the sales team who has been with the company for many years who reported how straight forward the system is to use and how much easier it makes his job – that was the confirmation needed to ascertain **Workbooks had been the right choice!**

[CLICK HERE TO READ MORE ABOUT OUR MANUFACTURING SOLUTIONS](#)

