

# CRM IN MANUFACTURING

## *Success Story*



A fast-growing global supply chain consolidator in the aerospace and automotive sectors went live with Workbooks in April 2018, with a specific initial focus on sales management. The choice for a CRM solution was based on three main criteria: a vendor that had accessible sales and support teams, a cloud-based solution, and an intuitive interface that was easy to engage with.



## SIMPLE SETUP

The team chose Workbooks because of its ease of use and flexibility; “it seemed possible to tailor the system to do exactly what we wanted. We gave Workbooks our specific requirements and they came back to us with a proposition; we felt confident that Workbooks could deliver and was the best solution for us.”

**The turnaround from order to implementation was quick and easy and there were no nasty surprises.** They add: “there was great communication with the team while they were configuring the product and the on-site training day was great – everyone was fully engaged. It also fuelled us with the knowledge we needed to be able to carry out further training without having to rely on Workbooks.”

“There is always an element of dread when implementing a new system, but **Workbooks made it very straightforward and they deserve great credit for that.**”



## USING CRM TO MANAGE THE SALES JOURNEY

Workbooks is used to manage the sales process for new projects, which can be a complex journey, sometimes happening over a number of years; **Workbooks helps the team stay on top of every element of this complex journey**, from forecasting to pipeline management, to overseeing sales team performance.

One of the key early wins was the way the Workbooks system helped the team keep tabs on the key performance metrics related to requests for quotations (RFQs) from customers.

The Commercial Manager comments: "in our business there's usually a set period in which to respond to customers' RFQs. We need to be able to see at a glance what percentage of RFQs are being answered on time and, if they aren't, why we are missing the deadline. Workbooks CRM is critical to helping us stay on top of that".



## LOOKING AHEAD

As a fast-growing company, having acquired several businesses over the past few years, the management team want Workbooks to become the CRM system of choice across the group. They explain: "all of our new businesses are still using Excel, which makes it hard to report to the board at a group level. Some parts of the business aren't quite ready to switch yet but we're working on that."

They also want to enhance the reporting side of the system to extract more valuable insights from their data; "**what we have now is first-class**, but we know it's capable of much more than we're currently using it for."

"Overall, Workbooks CRM has definitely helped us achieve what we set out to do. In the early days of a new system when you don't really know the product, you're more dependent on support services than you would normally be. We were hoping Workbooks' support would be excellent and we weren't disappointed".

"The speed of response is great, the people we speak to are always helpful and on-the-ball, with all the necessary context information to hand and issues are always resolved quickly. We couldn't really ask for more. **All in all, we're delighted with our CRM system and we look forward to increasing its use and benefits across the group.**"

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