

Success Story

ARLINGTON AUTOMOTIVE USES WORKBOOKS TO MANAGE COMPLEX ASSEMBLY LINE PROJECTS

Workbooks helps the team stay on top of every element of a project from forecasting to pipeline management to overseeing sales team performance.



“WORKBOOKS CRM IS CRITICAL TO HELPING US STAY ON TOP OF CUSTOMERS’ REQUESTS FOR QUOTATIONS”

Jez Hunt - Commercial Manager, Arlington Automotive

INTRO

As one of the fastest-growing global supply chain consolidators in the aerospace and automotive sectors, Arlington Automotive operates in the UK, Europe, USA, China and India.

The company went live with Workbooks in April 2017 with a specific initial focus on sales management. Group IT Manager Bill Penfold says the choice of a CRM solution was based on three main criteria: a vendor that has an accessible sales and support team, the system being cloud-based, and an intuitive interface that is easy to engage with.

He explains: “I know from experience how frustrating it can be to work with vendors from other parts of the world – whether because their technical support team are in a different time zone or because their corporate structure is too complex to get a straight answer quickly. So we knew we wanted a UK-based vendor with local support.”



IMPROVED SALES
PROCESS MANAGEMENT



KPI TRACKING &
MANAGEMENT



SUPPORTING BUSINESS
GROWTH

“We also knew we wanted a cloud-based solution so that we weren’t tied to an internal network. As a group we’re growing quickly through acquisitions and we want people to be able to access information from anywhere as soon as they join the group.”

“Finally, it needed to be intuitive. Some of our sales people had had bad experiences with other CRM systems and were consequently either indifferent or negative about them. If we wanted our people to adopt the new system, we knew it had to be a good product to engage with.”

SIMPLE SETUP

Bill and the rest of the Arlington Automotive team assessed several CRM systems that seemed to address all three of these main criteria. In the end they chose Workbooks because of its ease of use and flexibility. He says: “The admin looked straightforward and 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 that seemed very acceptable in terms of implementation time and cost. 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 to contend with. Bill says: “The start-up time was quite short, which is what we needed because it helped us keep everybody engaged. The budget set at the beginning did not overrun and we got what we wanted within the agreed timeframe and budget – which is great.”

“I’ve implemented many systems over the years and there’s always an element of dread involved. I knew it could have been horrible – either because of the system itself being overly complex or people being difficult to deal with. But Workbooks made it very straightforward and they deserve great credit for that.”

“THE IMPLEMENTATION WAS PROJECT MANAGED WELL AND EVERYTHING WENT SMOOTHLY. THERE WAS GOOD COMMUNICATION WITH THE TEAM WHILE THEY WERE CONFIGURING THE PRODUCT AND THE ON-SITE TRAINING DAY WAS GREAT – EVERYONE WAS FULLY ENGAGED AND WE ALL HAD FUN. IT ALSO FUELLED US WITH THE KNOWLEDGE WE NEEDED TO BE ABLE TO CARRY OUT OUR OWN RETROSPECTIVE REMEDIAL TRAINING WITHOUT HAVING TO RELY ON WORKBOOKS.”

Bill Penfold - Group IT Manager, Arlington Automotive

USING CRM TO MANAGE THE SALES PROCESS

A good example of the way Arlington Automotive uses Workbooks is managing the sales process for new projects. The company provides two types of product to motor manufacturers: those targeted at the after-market and those intended for the assembly line.

The assembly line projects in particular can be complex. A manufacturer might provide computer aided design (CAD) drawings to specify what they need, then Arlington needs to source the right parts from its 600-plus suppliers, before putting together a quote for the lifetime of the project – which could be several years – and then going back to the manufacturer. 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 Arlington Automotive keep tabs on the key performance metrics related to requests for quotations (RFQs) from customers.

“IN OUR BUSINESS THERE’S USUALLY A SET PERIOD IN WHICH TO RESPOND TO CUSTOMERS’ RFQS. WE NEEDED TO BE ABLE TO SEE AT A GLANCE WHAT PERCENTAGE OF RFQS WERE BEING ANSWERED ON TIME AND, IF THEY WEREN’T, WHY WE WERE MISSING THE DEADLINE. WORKBOOKS CRM IS CRITICAL TO HELPING US STAY ON TOP OF THAT.”

Jez Hunt - Commercial Manager, Arlington Automotive

LOOKING AHEAD

Arlington Industries is a fast-growing company, having acquired several businesses over the past few years. Bill and Jez want Workbooks to become the CRM system of choice across the group. Jez explains: “All of our new businesses are 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. Jez says: “What we have now is first-class, but we know it’s capable of much more than we’re currently using it for. We’d like a really good suite of reports to line up to our KPIs so there’s less admin time.”

About

“Overall, Workbooks CRM has definitely helped us achieve what we set out to do. As with any system, we’ve got to make sure we stay on top of updating it regularly – the quality of the information it provides is only as good as the data we put into it – but that’s something for us to work on.”

“In the early days of a new system when you don’t really know the product, you’re quite vulnerable and more dependent on support services than you would normally be. I was hoping Workbooks’ support would be excellent and I wasn’t disappointed.”

“The speed of response is good, the people we speak to are always helpful and on-the-ball, with all the necessary context information to hand, so we don’t have to explain things every time, 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.”

Bill Penfold - Group IT Manager, Arlington Automotive

INDUSTRY

Manufacturing

NUMBER OF EMPLOYEES

201-500

IMPLEMENTATION DATE

April 2017

TECHNOLOGY

- Workbooks CRM
- Outlook Connector
- Multi Currency
- Audit

Contact Workbooks

EMAIL

success@workbooks.com

PHONE

+44 (0) 118 303 0100

LINKEDIN

[linkedin.com/company/workbooks-com](https://www.linkedin.com/company/workbooks-com)

TWITTER

twitter.com/workbooks

WEBSITE

[workbooks.com](https://www.workbooks.com)