

## Success Story

# WORKBOOKS CRM IS HELPING DRIVE EFFICIENCY AND EFFECTIVENESS ACROSS THE BUSINESS

Greater insight - Better decision making - Consistent processes - Best practice sharing

aspin

"MY BUSINESS HAS BECOME MORE PREDICTABLE. I MAKE INFORMED DECISIONS AND I CAN PRIORITISE BETTER. I AM BACK IN CONTROL."

Nathan Aspin - Managing Director, Aspin

## INTRO

Since 1984 Aspin has been helping its clients make the most of their sales opportunities. It does this by developing, implementing and supporting sales order processing apps for distributors. Most notably, its PixSell iPad app allows sales reps to take field-based orders, and its InterSell B2B eCommerce websites lets retailers place orders 24/7.

## LOOKING FOR A SINGLE CUSTOMER VIEW

Prior to its implementation of Workbooks in 2014, Aspin stored information across several systems. These databases harnessed all the information Aspin needed but they were maintained by different departments.



EASE OF USE & FLEXIBILITY



GREATER VISIBILITY AND CONTROL



OPTIMISED SALES PROCESS FROM PROSPECT TO CASH

They had separate databases for customers, prospects and jobs, and this meant they had limited visibility across the organisation. They wanted a solution that connected all of this information to give a 360 degree view of a customer.

**“WE WANTED A SYSTEM THAT COULD PROVIDE A HOLISTIC VIEW OF OUR INTERACTIONS WITH A CUSTOMER INCLUDING NOTES, ACTIVITIES, MEETINGS, MARKETING, QUOTES, ORDERS AND INVOICING. WE LOOKED FOR A WEB-BASED SOLUTION SO THAT STAFF COULD SEE ALL CUSTOMER INTERACTIONS WHETHER THEY WERE IN THE OFFICE OR ON THE ROAD.”**

**Nathan Aspin** - Managing Director at Aspin

## A FLEXIBLE SOLUTION

The team looked at a number of CRM providers including Salesforce, Zoho, and Autotask and quickly selected Workbooks. Aspin recalls that a key factor in his decision was the amount of flexibility the Workbooks platform offers.

‘Workbooks offered more flexibility out of the box: he explains. “The easy-to-use interface meant that we could drive the system ourselves and customise it as and when required. I was keen to use the skills we have in-house to carry out a lot of the implementation, but it was great to know the Workbooks team would be there to support us as needed. The Workbooks delivery team worked alongside us to ensure implementation was a success, providing valuable advice and end-user training.”

## PROFOUNDLY EMBEDDED

Three years later, Workbooks is now profoundly embedded in the way Aspin operates. It is used by sales, telemarketing, marketing, and the entire support team, across first, second and third line support.

The firm has implemented Workbooks Web2Lead so that website visitors are identified and added as leads in the system. In fact wherever a lead comes from, be it the website, social media, telemarketing, referral, or some other route, it goes into Workbooks.

Aspin describes himself as ‘fanatical’ about this: “I input everything into Workbooks and I expect my sales team to do the same. It forms the basis of our sales discussions and meetings during which we review leads, opportunities and quotes. Basically, if it’s not in Workbooks, it doesn’t exist!”

The system allocates leads to telemarketing or sales to develop. All activities are recorded on there. It links into the firm’s finance systems so that invoice information is visible on Workbooks, and customer support also uses it to manage cases.

## ASPIN IS USING WORKBOOKS CRM FOR:

- Recording all sales related activities
- Maintaining customer and prospect records
- Recording support cases
- Driving project opportunities
- Driving quotations through to acceptance
- Tracking sales leads
- Managing marketing campaigns
- Providing management with key business metrics

## OUT OF THE TRENCHES

A quick win for Aspin was to gain a single view of all customers. "Since implementing Workbooks, we have one system to manage our sales process from prospect to cash. Information sharing between departments is quicker, easier and more effective."

Workbooks is now giving Aspin far deeper insights into its existing customers. They can see which customers are active, how often they request quotes, the outcomes of those quotes, the type of projects that they buy, the support they required. This enables Aspin to deliver an enhanced service to its customers. "Our enhanced understanding of the customer base is helping us make the right decision for the business and for our customers."

For Aspin himself, the greatest benefit of Workbooks has been the visibility and control he has gained. He says: "It provides me with weekly and monthly reports on the key performance indicators of the business: what people are doing, what is happening with our projects, sales, support and customer service. As the Managing Director, it allows me to understand what is working well and what needs attention. This helps me focus my time on what matters, where my input is required and where I can add value."

Aspin enthuses about the reporting in Workbooks.

**"THE REPORTING CAPABILITY IS EXCELLENT. IT IS GRANULAR - YOU CAN SLICE AND DICE THE DATA TO GET VALUABLE INSIGHT INTO YOUR BUSINESS. IT HELPS ME MOVE OUT OF THE TRENCHES AND HAVE A MORE 'HOLISTIC VIEW' OF WHAT IS HAPPENING ACROSS THE BUSINESS."**

**Nathan Aspin** - Managing Director at Aspin

"We are able to track individual sales performance and activity level. This allows us to understand and identify best practices and share them across the team. We can also spot any issues and provide support as needed, and so driving greater consistency across the team and across our sales process."

Finally, it is giving Aspin a more accurate view of his firm's future. "I get a clear view on quotes, and so am able to confidently forecast what is coming in and can plan resource more accurately. My business has become more predictable. I make informed decisions and I can prioritise better. I'm back in control."

## A JOURNEY TOGETHER

Aspin intends to make even greater use of Workbooks' potential. "We're looking at the marketing automation component. The data about our prospects and customers is all in Workbooks, and a fully integrated marketing automation solution – which is what Workbooks can offer – would make life so much easier for our marketing team."

He concludes: "We are on a journey. We are continually looking for ways to become more efficient and effective, and we know Workbooks are there to support us and help us to make that happen."

## About

### INDUSTRY

IT & TELCO

### IMPLEMENTATION DATE

June 2014

### NUMBER OF EMPLOYEES

11-50

### TECHNOLOGY

- Workbooks CRM
- Outlook Connector
- Audit

## Contact Workbooks

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