

## Success Story

# FORUM OF PRIVATE BUSINESS FINDS PEACE OF MIND WITH WORKBOOKS

Workbooks CRM provides consistent, accurate data that helps the Forum team improve the service they offer to their members.



**“WORKBOOKS GIVES ME COMPLETE CONFIDENCE THAT THE NUMBERS WILL BE RIGHT AND THAT MAKES A HUGE DIFFERENCE FROM A MANAGEMENT PERSPECTIVE.”**

**Ian Cass** - Managing Director, Forum of Private Business

## FORUM OF PRIVATE BUSINESS

The Forum of Private Business is a not-for-profit organisation offering support to companies – most of which employ fewer than 50 employees – about many aspects of running a business, from employment law, HR and health and safety, to finance, legal, compliance, marketing and sales.

Until 2017, the Forum relied on a cobbled-together CRM solution based on an old, unsupported version of Microsoft Dynamics, which included an integrated Sage 200 Enterprise Resource Planning (ERP) system.

Over the years, the old CRM system was modified numerous times to make it fit the Forum’s requirements – but those modifications were undocumented, which eventually made the whole system unmanageable and impossible to update. The lack of documentation made support and training increasingly problematic too.



**IMPROVED MEMBER EXPERIENCE**



**ACCURATE REPORTING**



**MORE FUNCTIONALITY OUT-OF-THE-BOX**

## DITCHING FRANKENSTEIN'S MONSTER

Forum Finance Director Jane Connors who led the project says: "Our old system had become a bit of a Frankenstein's monster. We decided our best bet was to ditch it completely and start from scratch."

**"WE WERE VERY KEEN TO MOVE TO A SYSTEM WE COULD USE STRAIGHT OUT OF THE BOX. WE WANTED SOMETHING THAT WOULD NEED ONE OR TWO TWEAKS RATHER THAN THE HEAVILY CUSTOMISED SYSTEM WE WERE USED TO. WE KNEW THAT USING A SYSTEM THAT WAS AS NEAR STANDARD AS POSSIBLE WOULD MEAN WE'D BE ABLE TO KEEP IT UP TO DATE MUCH MORE EASILY."**

**Jane Connors** - Finance Director, Forum of Private Business

The new solution had to be easy to configure and update. It needed to be flexible enough to grow with the Forum – but it also had to be possible to make any modifications in-house rather than paying consultancy fees whenever anything needed changing.

The Forum team also wanted the new CRM to integrate seamlessly with other systems such as MailChimp. Finally, the new system had to improve the Forum's reporting capabilities. The old CRM made it difficult to set up reports based on customers' geographical locations or industry sector, for example. The new system had to be more flexible and fit for purpose.

## TAKING THE PLUNGE

Jane and Forum Managing Director Ian Cass looked at around 10 potential solutions, which they whittled down to a shortlist of just two. Workbooks won the day because of the high service levels it offered, together with the confidence inspired by the Workbooks team – these were people the Forum team felt comfortable about working with.

The Forum switched to Workbooks in June 2017. Implementation went very smoothly – it was all handled over a weekend with the help of Wizard Systems experts, who remained on-hand afterwards to trouble-shoot any issues and provide refresher training.

Adoption across the Forum was quick and easy. Jane says: "Everyone picked it up very well – there were no significant teething problems. To be honest, we thought at least a few people would be resistant, but everyone quickly saw the value added by Workbooks. They were over the moon when they learned what the system could do – no more working from many different systems!"

## MORE ACCURATE DATA, MORE SOPHISTICATED COMMUNICATION

There are two main departments at the Forum of Private Business: the member engagement team and the communications team. Member engagement run the Forum helpline and speak to members day-to-day. They use Workbooks to keep members' details up to date, record issues and queries from members and summarise the advice given.

The communications team use Workbooks to send targeted messaging to segmented member audiences – something that simply wasn't possible with the old system. This increased sophistication of communication was another reason for changing systems. In place of the old manually updated spreadsheets there are now lists with membership data that are automatically updated. The marketing team are looking to expand on using these lists to establish the ROI of their marketing investments. e.g. when they import leads from tradeshow they have attended they will market to these audiences and use reports to track how many conversions they have had.

Because of the lack of training and support available for the old set-up, Forum staff had found their own workarounds for any issues they came across. This resulted in a fragmented system that rarely worked the same way for any two people – and resulted in inconsistent data being captured about members. Workbooks has given Ian and Jane confidence that everything is being recorded accurately and managed consistently because everyone received the same training and is using the Workbooks system in the same way.

## COMPLETE CONFIDENCE

Ian says: "If one of our members rang with an issue and it became a customer service case, I'd want to know how many other similar cases we'd dealt with. But because of all the individual workarounds that had been set up, issues were rarely closed off properly so I couldn't be sure of any of the numbers I was being given."

Ian continues: "Workbooks gives me complete confidence that the numbers will be right and that makes a huge difference from a management perspective. The old inconsistencies meant we couldn't produce accurate reports – now we can"

**"THIS NEW-FOUND CONFIDENCE IN OUR DATA ALSO MEANS IT'S POSSIBLE TO FOLLOW UP WITH MEMBERS ONCE ISSUES HAVE BEEN CLOSED OFF AND WE'VE HAD SOME REALLY POSITIVE FEEDBACK ABOUT THAT. IT DEFINITELY IMPROVES THE MEMBER EXPERIENCE."**

**Ian Cass** - Managing Director, Forum of Private Business

When it comes to financial reporting, Jane says the team used a form of 'pidgin SQL' to interrogate the old system, which made it very difficult to extract the information they wanted. She says: "It was frustrating because we knew the information was in the system somewhere, but we couldn't always access what we needed. You'd start to build a report, get part-way through it, then reach a point where you just couldn't go any further – there were dead-ends everywhere."

Workbooks takes away that issue and gives every user the option to produce accurate, personalised reports – whether that's about membership renewals, commission payments or direct debit management.

## PLANS FOR THE FUTURE

Looking ahead, there are no urgent system changes or upgrades planned.

One enhancement the Forum team are considering is switching from MailChimp to Workbooks' own GatorMail email marketing solution, which would make it easier to send automated, targeted marketing email messages to any mailing list, no matter how complex or dynamic.

Because GatorMail is part of the Workbooks suite, it will be an easy switch when the time feels right.

Other possibilities include bringing direct debit collection in-house – and perhaps making use of the system's events and sales-lead capabilities.

But for now, Workbooks is doing everything the Forum team hoped for and they're just enjoying the peace of mind that comes with a consistent, reliable system that can be trusted to produce accurate, timely data.

## About

### INDUSTRY

Trade Association & Professional Body

### NUMBER OF EMPLOYEES

11-50

### IMPLEMENTATION DATE

June 2017

### TECHNOLOGY

- Workbooks CRM
- Workbooks Business
- Outlook Connector

## Contact Workbooks

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