

Success Story

WORKBOOKS HELPED GOOD SALON GUIDE TO GENERATE NEW BUSINESS AND IMPROVE CUSTOMER RETENTION

Workbooks CRM supports growth.



"WORKBOOKS IS A FAR MORE FLEXIBLE SYSTEM THAT I CAN AMEND, BUILD AND CHANGE MYSELF WITHOUT REQUIRING EXPENSIVE CONSULTANCY."

Gareth Penn - Managing Director, Good Salon Guide

INTRO

Good Salon Guide, the only independent guide to standards in the hairdressing and beauty industries, has implemented Workbooks CRM to create a single source of all customer and prospect information.

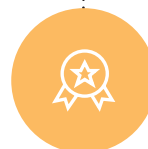
Improved reporting has enabled the company to evolve its sales model from customer number to customer value; while new customer segmentation and integration with both its website and MailChimp is supporting a far more effective marketing and sales model.



IMPROVED CUSTOMER RETENTION



IMPROVED REPORTING



SALES MODEL EVOLUTION

GOOD SALON GUIDE

The Good Salon Guide is the only independent, nationwide scheme for assessing professional standards and services within the hairdressing industry. The 2,000+ salons listed in the guide are rated by professionally trained inspectors against a set of criteria, similar to the process undertaken by AA or RAC hotel guides – and consumers can rapidly find local salons online via the Guide's website. For salons, the value of the scheme's membership – which is paid for by monthly subscription – extends beyond the additional promotion and stamp of consumer confidence to include advice and guidance on business issues and access to money saving offers.

There are around 34,000 salons in the UK and Northern Ireland and the Good Salon Guide has a team of remote sales people dedicated to each area. However, with no access to a central customer database, each sales person has been reliant upon his or her own information, with an unruly mix of spreadsheets, business cards and paper notes to manage activities, appointments and follow up activities.

As Gareth Penn, Managing Director, Good Salon Guide, says, the company had a clear need for a CRM system that could provide a single source of customer and prospect information. "With a remote sales team, the biggest challenge is identifying and sharing information across the business. We had a Microsoft Access database that held customer information at head office but with individual sales people retaining and managing their own information we lacked central visibility and control."

Penn adds, "Each sales person knows the potential clients and has a good strong relationship with current clients in each area – but if a salesperson left, all that essential business knowledge would be lost."

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COST EFFECTIVE CRM

The Good Salon Guide assessed a number of CRM products on the market to create a short list of two: Workbooks and Salesforce, before opting for Workbooks. Penn confirms, "Workbooks is a far more flexible system that I can amend, build and change myself without requiring expensive consultancy. Indeed, the fact that I am dealing direct with the software developer rather than a third party is also really valuable. Finally, the Workbooks subscription is considerably cheaper than Salesforce – this is a strategic, long term product for us and that cost differential was really important."

Following a smooth implementation and data migration process, Workbooks is now a fundamental part of the day to day business process for both sales and head office staff – from the creation of a new client file to recording every single interaction with salons.

For head office staff, this can range from an emailed request for a window sticker to a phone call asking for business advice regarding employment law; while sales staff are recording every call and meeting notes via iPads. "All of this information is recorded within Workbooks as an activity, which means anyone with the right permission can access the latest information on any client at any time," Penn explains.

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REFINING THE SALES PROCESS

While the number of salons in the UK has remained the same over the last 15 years, despite the recession, the lifespan of the average business has reduced significantly – from around eight years, to just four. For the Good Salon Guide it is therefore important to engage with new salons as soon as they open to maximise each new business opportunity. "Workbooks is enabling us to react more quickly and follow up the initial contact more effectively," Penn says.

The company has recently begun to use Workbooks reporting functionality which, Penn confirms, is providing far more insight into the sales process. "In the past I only knew that a prospect had received a presentation and whether the business had been won or lost. Now, we are tracking sales through a four stage process, from initial presentation through to closure," he says.

With this visibility, the company can now compare the performance of sales staff and identify problems in the sales process that may require additional support from the sales manager. This information will also support far more accurate forecasting and pipeline management. In fact, Penn explains, "The Guide is now able to take a different approach to sales targets. In the past we had no option but to base targets on the number of new clients. Now with this level of detail, sales staff will be incentivised on the value of new business."

SUPPORTING SALES

With a central view of all clients across the country, the Good Salon Guide has embarked upon more detailed customer segmentation and highly focused marketing campaigns to support the sales team. The company has also exploited the Workbooks API to integrate with its website, enabling it to track the number of views received from members of the public. Penn says, "This integration has transformed the return on investment message we can share with clients: a sales person can show the number of views a salon has received through our website – demonstrating the additional business we are helping to generate for that salon."

Workbooks is also integrated with MailChimp, making it easy to exploit the new segmentation to deliver targeted email campaigns to both clients and prospects. Looking ahead, the Good Salon Guide plans to integrate other data sources within Workbooks, including its Sage accounting package and the Direct Debit software used to collect monthly subscriptions from clients, to create a seamless, end to end business process.

Penn concludes, "The essential requirement was a system that would allow us to share information easily. The business value held in relationships with both prospects and customers is no longer limited to specific individuals; everyone in the company has the same information. In fact we now have more knowledge about all the potential business in an area than ever before; Workbooks will enable the Good Salon Guide to be far more thorough in both sales and marketing and I genuinely believe this will lead to both a growth in new business and improvement in customer retention."

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About

INDUSTRY

Trade Association & Professional Body

NUMBER OF EMPLOYEES

11-50

IMPLEMENTATION DATE

March 2014

TECHNOLOGY

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- Outlook Connector

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