

## Success Story

# COMMUNICATION BETWEEN DEPARTMENTS IS NOW QUICKER AND EASIER

Workbooks provided Magatech with a better visibility of their pipeline and a connected view of all their data and customer engagement.



**"I FEEL CONFIDENT THAT WE CAN IDENTIFY WHICH CONTACTS MIGHT BE INTERESTED IN SPECIFIC PRODUCTS AND CAN SEND TARGETED COMMUNICATIONS TO CUSTOMERS."**

**Quentin Jones** - General Manager at Megatech Ltd

## INTRO

Megatech Limited is the largest independent supplier of equipment and services to the semiconductor and thin film industries in the UK.

The Megatech team have unrivalled in-depth technical expertise and knowledge of the latest developments in technology, enabling them to advise their customers on where best to source semiconductor and thin film products in order to meet the customer's individual needs.

Established in 1973, Megatech has built a well-founded reputation for the supply of quality products and excellent customer service.



**IMPROVED EMAIL TARGETING**



**FASTER INTERDEPARTMENTAL COMMUNICATION**



**BETTER PIPELINE VISIBILITY**

## BARRIERS BETWEEN DEPARTMENTS

For Megatech there are a number of different processes and teams involved in moving a customer from lead stage through to the final invoicing stage.

Separate systems had been implemented for each team and it soon became clear that this was preventing effective communication between departments.

Salesforce.com was used by the marketing team to monitor the leads that they generated, and by the sales team to take a prospect through the sales journey. The accounting team used Sage Line 50 for invoicing, alongside a system of Excel spreadsheets to manage products, costs and margins on costs. The Operations team (customer services) used a separate system and sometimes found that organisation names or details would differ slightly between the accounting software and the customer services software, thus delaying the transfer of information between the departments.

In addition, Megatech liaise with a large number of suppliers on a regular basis and the relevant pricing schemes, contact details and addresses of each of these suppliers were stored in Excel spreadsheets.

This network of separate systems became ineffective and inefficient. The departments were constantly communicating but sharing data was more arduous than it needed to be. Quentin Jones, General Manager at Megatech Limited quickly realised that something needed to change.

**"I HAVE ALWAYS BEEN AN ADVOCATE FOR DISSOLVING BARRIERS WITHIN ORGANISATIONS AND ENSURING THAT DEPARTMENTS CAN COMMUNICATE WITH EACH OTHER QUICKLY AND EFFICIENTLY."**

**Quentin Jones** - General Manager at Megatech Ltd

## A FIRST ATTEMPT AT CRM

Megatech Ltd had implemented Salesforce but the team felt that this did not meet their specific requirements. Quentin explains: "We tried to use Salesforce but it effectively became a repository of contacts and miscellaneous information. We ran into difficulty with the Outlook connector in Salesforce and we noticed that it caused a few issues with data duplication - we effectively ended up with an enormous, unusable database of duplicated data."

Crucially for Megatech, Salesforce did not provide them with the functionality that they needed to break down the barriers to communication between the different departments in the organisation.

Quentin continued: "In addition, the Salesforce CRM system did not unite the front and back office; the sales and marketing teams could not see finance information so, for instance, sales might try to sell to someone who had defaulted on their previous payment, and the customer services team could not easily see financial information relating to customers when responding to queries. My goal was to find a system that would break down the silos between each team and that could support all of the functionality that we needed."

## A SECOND CRM PROJECT THAT DIDN'T DELIVER RESULTS

Having experienced difficulty with Salesforce, Megatech implemented Sage CRM. Quentin explains, "At the time it seemed logical to go with Sage CRM because it was important that our CRM system could integrate with our Sage accounting system. Sage promised that there would be an interface between Sage CRM and Sage Line 50 within 3 months and we assumed that the integration would be good between two Sage products."

Unfortunately, shortly after Megatech had implemented Sage CRM, they were informed that Sage had decided not to go ahead with the interface and this left Quentin and his team disappointed for a number of reasons; "Sage CRM was clunky and we found that the search functionality was very poor; the users weren't happy with it and it still didn't do what we wanted it to do because it couldn't integrate with our Sage Line 50 accounting system."

## BACK TO THE DRAWING BOARD

The Megatech team opted to look for a CRM package that would enable them to achieve Quentin's goal of streamlined communication throughout the organisation. They narrowed down their search to three vendors; Netsuite, Sugar and Workbooks. After a rigorous selection process they chose Workbooks.

**"IN TERMS OF PRICE, FUNCTIONALITY AND SUPPORT WORKBOOKS CAME OUT ON TOP. WE LIKED THE FACT THAT MANAGING PRODUCTS AND PRICING SCHEMES WAS EASY, AND THAT THE SYSTEM WAS DESIGNED TO BE FLEXIBLE TO ALLOW FOR CUSTOMISATION."**

**Quentin Jones** - General Manager at Megatech Ltd

## WORKBOOKS: A UNIFIED SYSTEM

Since implementing Workbooks, Megatech now has a single unified system to manage the whole sales process, from prospect to cash. After a number of failed CRM projects, Megatech have found a CRM system that has made communication between departments quicker, easier and more efficient.

Quentin explains: "What I love about Workbooks is that it has knocked down the barriers that we were experiencing between teams and has given us a connected view of all of our data and our customer engagement."

"We have better visibility of what is in our pipeline and we can now produce quotations, orders and invoices from the same system. All of our supplier information can be accessed by the whole company, we can track our day-to-day communications with suppliers and we can produce supplier orders at the click of a button."

## ORGANISED DATA SAVES VALUABLE TIME

Although the main focus of Megatech's CRM project was to unite the sales, marketing, operations and finance teams, another requirement was email marketing functionality.

The Workbooks marketing and campaign management tools have helped the Megatech team to transform the way they communicate with existing customers, prospects and suppliers.

Quentin explains, "Our area of expertise is so niche that many of our prospects already know where to find us and we had got out of the habit of going out to market.

Workbooks has enabled us to change how we communicate with prospects and customers," says Quentin, "In Workbooks we are able to segment our data to set up a mailing list, create marketing campaigns, run the campaign through MailChimp and then analyse the bounces, opens and clickthroughs back in Workbooks for our sales and marketing teams to follow up."

**"I NOW FEEL CONFIDENT THAT WE CAN IDENTIFY WHICH CONTACTS MIGHT BE INTERESTED IN SPECIFIC PRODUCTS AND CAN SEND TARGETED COMMUNICATIONS TO CUSTOMERS. IN ADDITION, WE ARE ABLE TO SEND TAILORED NEWSLETTERS TO OUR SUPPLIERS. IT'S GREAT AND WE HOPE TO CONTINUE TO MAKE MORE USE OF THIS FUNCTIONALITY IN THE FUTURE."**

**Quentin Jones** - General Manager at Megatech Ltd

## About

### INDUSTRY

Manufacturing

### NUMBER OF EMPLOYEES

1-20

### IMPLEMENTATION DATE

September 2012

### TECHNOLOGY

- Workbooks CRM
- Multi Currency

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