



Case Study

ULTIMA MEDIA

CRM to generate 5 times more new prospects



ULTIMAMEDIA

CRM formed a core part of our business transformation and our investment in Workbooks has proved timely and valuable. It's enabled us to put customers and data at the heart of our business.

GAVIN MILLER
Managing Director

INTRO

Ultima Media is a global B2B publishing and events business that has undergone a significant digital transformation. For years it has served the automotive industry - vehicle makers to parts suppliers, service centres, software developers and equipment providers - through magazines, websites and events.

It does this across three primary brands: Automotive Logistics, Automotive Manufacturing Solutions and Car Design News. Headquartered in London, its primary markets are North America and Asia, and it generates revenue through ad sales, subscriptions, events, webinars and awards programmes.



A single source of data



Better prospecting



Valuable business insights

DIGITAL TRANSFORMATION

Over the years, as its product portfolio and customer databases grew Ultima had assembled around a wide range of technologies and databases, including 15 different sources of data. Database & Circulation Manager, Justyna Wanczyk, reports that this presented significant challenges. “We had no visibility of our data. This meant we couldn’t clean or organise that data, building marketing campaigns was time and labour intensive, it was difficult to extract meaningful reports, and we were unable to make any decisions based on data.”

It was a similar story across the business, and MD Gavin Miller reports that it was clear this needed to change.



Ultima needed to transition to a more focused media, content, digital, data and intelligence business – so we embarked on a review of its websites and CRM.

GAVIN MILLER
Managing Director



VITAL ROLE FOR CRM

A key part of this business transformation was upgrading its CRM platform to one that would give a single view of all of the company's data, in a format that's accessible and usable for sales, marketing and editorial teams. Gavin and his team also needed the CRM platform to help grow the brand's audience and revenue.



CRM needed to align itself across multiple touch-points in the business: sales, marketing, editorial and finance. So it was important to ensure it formed part of our over-arching digital transition in the business. Return on investment was clearly an important criterion for us but so was building value

GAVIN MILLER
Managing Director

A CLEAR WINNER

Justyna led the search for a CRM solution that would deliver this. Asking for recommendations from other media companies produced a shortlist of two: Workbooks and Salesforce. The team spent a couple of months exploring both options. They were moving their website to a new platform provider at the same time and wanted to move both together, so there was some time pressure on the selection process. The team was clear on what they needed though.

"We wanted a good return on investment, and a system that we could customise to our needs," says Justyna. "We also recognised that this was new to all of us so we'd need a vendor who could advise and direct us. Workbooks stood out as the natural choice in all three areas. It's a readymade tool with templates that give you a good start, but it also had the flexibility to allow us to make it into our own system."



SMALL, SUCCESSFUL STEPS

With the choice made, the relationship began with a shared success workshop, bringing together all the stakeholders to discuss the outcomes they wanted from the CRM implementation and so the step by step process began.

In May 2018 Workbooks started configuring the backend, then moving on to data migration which was complete within only a month. From there, the first use was by the marketing department. CRM implementation required a joined-up approach across all teams but marketing was keen to get started so it made sense to start there.



We couldn't just move all our marketing emails to the Marketing Automation module within Workbooks, as it would have created a lot of bouncebacks, so we just did it gradually, and it worked well. Taking those small steps and showing everyone that it was working was crucial to getting everyone engaged.

JUSTYNA WANCYZK

Database & Circulation Manager

The sales team was reluctant at first, but a combination of the shared success workshop showing them how they could benefit, the visible successes the marketing team has had, and the ongoing training provided by Workbooks and internally, has encouraged them to get involved. Now all sales activity from opportunities, to orders and contact management is taking place within Workbooks.



DECISION-MAKING TRANSFORMED

Justyna reports that the firm now has visibility across all brands and departments, and this has transformed its ability to make decisions based on data. Anyone in the organisation can see who has had contact with a client and what they've discussed. So, sales can see if editorial has been arranging an interview, and they can adapt the timing and content of their pitches accordingly.

Further back in the funnel they can see who has looked at which part of the website and also what they have clicked on. This informs marketing's content activities, as well as outreach by the sales team.



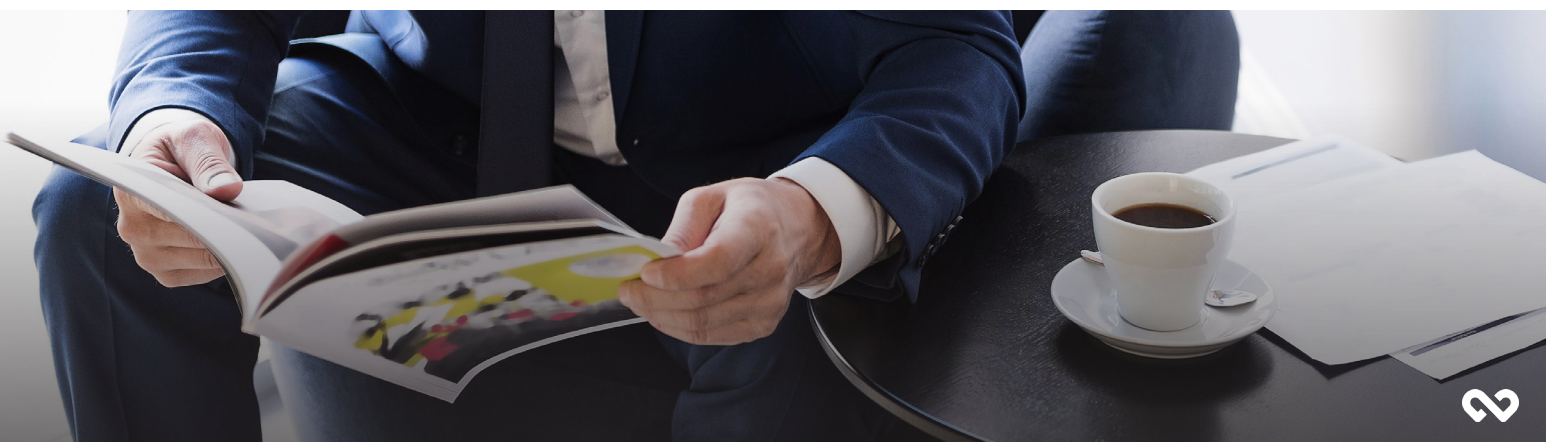
Some of the salespeople have really embraced web insights. One of them was saying recently he has picked up at least ten new accounts by using it, this is 5 times more than before we implemented Workbooks as he would have concentrated more on existing clients, but web insights is making his new business prospecting far smarter and more effective.

JUSTYNA WANCYZK

Database & Circulation Manager

"Since the outbreak of COVID, our business has accelerated its digital transition," concludes Gavin. "We have only been able to focus on all things digital from livestreams, to digital events, conferences, e-editions and more."

He adds: "CRM formed a core part of our business transformation and our investment in Workbooks has proved timely and valuable. It's enabled us to put customers and data at the heart of our business, to help us build, engage and grow our audiences, and it has become a continually rich source of data through which we continue to build, grow and engage our B2B audiences, globally."



JUST THE BEGINNING

There is much more that Ultima can do with Workbooks. It is looking to track the user journey to analyse behaviour to be more sophisticated and serve custom content using workflows; the team is also looking at how it can migrate its subscriptions data to the platform and subsequently automate data flows between systems. Plus Outlook integration and Webinar platform integration is also being considered.



Throughout the process, communication from the Workbooks project team has been excellent. They've kept in touch, asked us how we're getting on, and suggested new ideas on how we could be using the platform. It's that proactive support that's highlighted all the small developments that have meant the system works so well. We're all looking forward to seeing what more we can do together in the future.

JUSTYNA WANCYZK

Database & Circulation Manager

ABOUT

INDUSTRY

Publishing

NUMBER OF EMPLOYEES

50

IMPLEMENTATION DATE

May 2018

TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Business Pro
- Workbooks Exchange Server Sync
- Workbooks Mapping Module
- Workbooks Contact Management
- Workbooks Event Module
- Spotler/Gatormail
- Web Insights

