



There's No Secret To CRM Success

A report on the successful
outcomes achieved by
Workbooks customers

Rated world's #1 CRM for customer
satisfaction over the past 7 years*

WORKBOOKS: MORE OF WHAT YOU NEED

*G2 Report 2021

Workbooks CRM adapts to your specific needs to ensure success

Whatever the nature of your business, Workbooks provides powerful CRM solutions that enable the successful and profitable integration of marketing, sales, customer relations and finance.

As a direct result of enhanced data access, Workbooks CRM platform gives companies rapid insight into their sales pipelines, conversion rates, customer retention levels and the effectiveness of their marketing campaigns.

Take a closer look at the wide variety of companies and organisations that have benefitted – and continue to benefit – from the introduction of Workbooks CRM into their daily business activities.

The case studies that feature in this white paper highlight successful outcomes in each of these four business-critical areas:

01. **Increased revenue & higher profits**
02. **Process improvements & cost reductions**
03. **Improved customer experience & increased customer retention**
04. **Better decision making & more informed insights**

The benefits you derive from Workbooks CRM and the successful business outcomes you achieve will be unique to your company and the customers you serve.

Once Workbooks CRM has been incorporated into your ways of working, your business will be considerably more efficient, more productive and more profitable.

Workbooks gives you MORE

Find out more about how the Workbooks team helps you achieve your goals.

Our expert consultants work closely alongside you to ensure the successful implementation of the Workbooks CRM platform within your organisation.

We also offer an initial **Shared Success Workshop** that highlights exactly how Workbooks can be used to meet your company's specific needs - and help you achieve future business success.

SIGN UP FOR SHARED SUCCESS

Increased Revenue & Higher Profits

Increasing revenue and boosting profit margins remain key drivers for companies. As the examples below demonstrate, Workbooks enables all kinds of businesses to achieve these essential goals of revenue growth and higher profits.

Our experience shows that there are significant opportunities within companies to improve the end-to-end sales process and enable salespeople to become more productive. Workbooks provides the necessary framework where the right systems are in place to ensure that strong leads are generated, prime sales opportunities are converted – and revenues thereby increase.

Further revenue can be gained by the introduction of efficient new systems that prevent revenue 'leakage', for example where there have been costly delays in closing sales – or even failures to bill for products and services!

The Workbooks platform also acts as an accurate data resource that channels information and delivers essential insights to the business to support on-going sales activity. In addition, our CRM system can automate repetitive tasks and remove administrative burdens, freeing up your sales team to concentrate on building customer relationships and achieving higher sales targets.

From better sales team management and enhanced sales execution to increased productivity, improved forecasting and insightful decision making, Workbooks enables sales personnel to work more effectively, identify more sales opportunities, close more deals – and grow more revenue.

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Revenue growth can be attained by identifying new clients as well as cross-selling and upselling to existing clients. Workbooks gives you the tools to target clients with precision.

John Cheney
CEO, Workbooks

INCREASED REVENUE

Case Studies

Workbooks helps businesses in many sectors achieve revenue growth and higher profits – as demonstrated in the following case studies from a selection of named and anonymous client companies and organisations.

TCMM SHUTTER GROUP

The TCMM Shutter Group is one of the UK's leading providers of interior window-shutters. Based in Brighton, it has achieved global reach and features five brands: Shutterly Fabulous, California Shutters, DIY Shutters, The Shutter Store and Carter & Clark.

Before engaging with Workbooks, this company had been running its business on multiple systems and various spreadsheets. An evident lack of control and poor data co-ordination was holding the firm back.

Workbooks undertook a thorough examination and appraisal of their business systems. Our helpful consultants gave TCMM the guidance and confidence for them to go ahead and implement our CRM platform. Within the first year of our CRM support, TCMM's revenue grew by £1million with no increase in the firm's headcount.

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We may not have started on our CRM journey expecting Workbooks to become the platform we'd run the business on, but that's where we've got to, and the efficiencies and insights that it's generated have been transformational.

Sam Tamlyn
Operations Director, TCMM Shutter Group

BUSINESS SERVICES COMPANY

This business services client sought to increase revenue from existing clients by 10% which would deliver a boost of £3.2million to their business turnover.

The company also wanted to improve the overall performance of its sales team by 10% in order to gain an additional £200k in annual revenue.

Our tailored Workbooks solution enabled them to achieve both these desired goals by:

- Focussing on the prospects who were most likely to convert to customers.
- Implementing an intelligent and informed cross-selling and upselling strategy.

“We showed this business services company how to use our Workbooks CRM platform to capture and apply further details of prospects and existing customers. This greater insight and control of data enabled them to close more deals and attain their increased revenue goals.”

James Kay
CTO, Workbooks

INCREASED REVENUE

Case Studies

HEALTHCARE FIRM

We helped this healthcare client benefit from additional annual revenue opportunities valued at £2.8million – which represented an increase of 10% over previous figures.

This valuable growth in revenue was achieved by:

- Accelerating the sales cycle whereby the time to close deals was reduced by over 60%.
- Enhancing cross-selling and upselling and improving decision-making processes.

These improvements combined to give them the necessary insight into their customers to achieve that 10% boost in revenue thereby adding nearly £3million to their turnover.

“Our introduction of Workbooks CRM into this healthcare company resulted in better lead-generation systems, reduced the time spent managing client engagements and enhanced their reporting capabilities – all of which led to increased sales, lower costs and greater profits.”

Alison Jones
Sales Manager, Workbooks

INTERIOR DESIGN COMPANY

When a company specialising in interior office design wanted to improve the performance of its sales team, they reached out to Workbooks.

Through the application of our CRM platform, this interior design firm experienced a major uplift in productivity together with a 25% improvement in conversion rates from the same pipeline. This jump in conversion success translated into extra annual revenue of £7million.

Further successes were attained by improving the company's marketing focus and generating a superior quality of leads for the sales team to follow up. These measures alone improved annual revenue by £500k and helped contribute to the overall increase in sales performance.

“Thanks to our involvement, this office design business achieved a marked improvement in the effectiveness of their marketing, while the quality of leads being passed on to the sales team was greatly enhanced with a 20% increase in qualified sales opportunities.”

John Cheney
CEO, Workbooks



Process Improvement & Cost Reduction

Among the major benefits of implementing Workbooks CRM are the associated improvements in processes – along with the cost reductions that inevitably result from such greater process efficiencies.

Inefficient processes take many forms including non-compatible sales and marketing systems, the use of old databases and Excel spreadsheets, a lack of automation for repetitive and manual tasks, inconsistent working practices and an inability to track sales team performance or the effectiveness of a marketing campaign.

These are all areas where Workbooks CRM works extremely well for our clients to streamline their processes and decrease their costs. And, of course, when you succeed in reducing your costs, you increase your profits.

Workbooks CRM helps companies reduce costs in other ways too, such as eradicating any duplication of effort and removing data inconsistencies. We enable companies to meet regulatory requirements thereby avoiding costly fines and damage to their reputations. For example, Workbooks CRM has helped many organisations become fully GDPR compliant.



PROCESS IMPROVEMENT

Case Studies

The following companies have all benefitted from process improvements thanks to Workbooks CRM. By streamlining practices and simplifying admin systems, costs are reduced and profits are boosted.

LLW REPOSITORY

The Low Level Waste Repository (LLWR) is the UK's primary disposal facility for low-level radioactive waste, collecting it from nuclear power stations as well as from hospitals and other handlers of low level radioactive waste, and then securely disposing of it or using suitable recycling methods.

LLWR needed instant access to accurate information on where every consignment was, so, when customers called and asked, the team member could answer immediately. Information needed to be brought out of people's heads, off the many spreadsheets the team was previously using and into one central location.

The IT team ran the procurement process, looking at a selection of vendors – including Salesforce. The final decision was easy as the LLWR team all agreed that Workbooks was the most user-friendly option. Now all the logistics information has been added into the system, so that LLWR can manage and track the transport, packaging and safety checks of each consignment.

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Workbooks has had a more positive impact on our organisation than we ever hoped for. It's now the platform on which we're running most of our business, and we continue to find new uses for it.

Jenny Prince
Business Change Manager, LLWR

SOFTWARE FIRM

When this technology company first approached Workbooks, they had a veritable 'spaghetti highway' of confused processes in place and lacked effective integration between their diverse systems. For example, Sales and Marketing were not joined to Finance with the result that invoices were often inaccurate.

Before the Workbooks platform was adopted and shaped to meet this software company's needs, their data was stored in multiple locations using a variety of systems that were difficult to access.

Centralising this data resource reduced the time users spent looking for information or dealing with out-of-date data. By creating a single data repository, Workbooks has freed up four hours a day for the Finance function alone, thereby saving this software firm both time and money.

“By taking the time to analyse and fix this problem of revenue leaks due to inefficient processes, Workbooks delivered a significant boost to this software company's turnover and removed a major source of frustration for its employees.”

James Kay
CTO, Workbooks

PROCESS IMPROVEMENT

Case Studies

ACCOUNTANCY PRACTICE

This full-service accountancy practice was struggling due to a lack of automation and a general failure to engage in integrated and consistent processes. The firm had accumulated 28,000 static sets of data while having only 9,000 active clients. The details relating to those live clients were hidden amongst almost 20,000 redundant legacy records.

This data confusion made it very difficult for people to find important information such as emails and client correspondence. The firm's management estimated that each employee wasted 10 minutes a day while searching for the right information, with the accumulated delays resulting in a loss of £500k per annum.

The introduction of Workbooks CRM – with its ability to centralise data and avoid duplication and inaccuracy – has solved this frustrating and expensive waste of time by streamlining processes and reducing costs.

“Important data needs careful handling. By introducing an easily-accessible centralised data management system, Workbooks has given control back to this accountancy firm and freed up valuable time that can now be devoted to profitable activities.”

Alison Jones
Sales Manager, Workbooks

XPS PENSIONS GROUP

XPS Pensions is the UK's largest dedicated pensions consultancy firm. In 2016 the company decided that the CRM system, provided by US company Salesforce, simply wasn't working well enough and chose to look for a new and better system.

The Workbooks team offered suggestions for how XPS could achieve the results they were looking for, then tested and reviewed the recommended processes to ensure the best solution was in place for each requirement.

Workbooks quickly enabled XPS to integrate its sales and marketing functions, allowing the company to make significant efficiencies and generate a high number of revenue opportunities while benefiting from substantial cost savings.

“We chose Workbooks as it was able to provide the CRM best suited to our needs – and we're very glad we did. It's a highly customisable product and the Workbooks team provide excellent support.”

Charlotte West
XPS Pensions Group



Better Customer Experience & Increased Customer Retention

On average it costs five times more to find a new customer than it does to retain an existing one. Which is why you really do need to make sure you concentrate sufficient effort on keeping your current customers happy!

Workbooks CRM will help your company improve customer retention rates through enhanced communications, targeted marketing and efficient account management, including getting to know your customers' requirements in much greater detail.

Workbooks even allows you to know when specific customers are in the danger zone and at risk of leaving, so you can focus your efforts on retaining their business.

Improved customer experience also makes it easier to cross-sell and upsell further services and products. But to make that happen, you really need to understand:

- **What your customer buys from you already.**
- **What they might be actively looking for.**
- **What they might need, but don't realise yet.**

Workbooks gives you the ability to get under the skin of your customers and makes sure that you're right there when they need you. We enable you to deliver excellent customer experiences and help target your marketing activity to be accurate and effective. Get these things right for your customers and they'll never want to leave!

BETTER CUSTOMER EXPERIENCE

Case Studies

Below we provide several examples of how Workbooks CRM helped our clients deliver better customer experiences and thereby improve their customer retention rates – and increase sales.

WHOLESALE AND RETAIL BUSINESS

This Wholesale and Retail company applied Workbooks CRM to approach its customer experience in a smarter way and provide a more intuitive approach to customer account management.

For example, the introduction of automatic prompts to follow up on first orders, proved to be extremely useful for their account managers while timely 'new account' follow-ups encouraged customers to start spending sooner.

Workbooks CRM enabled this business to respond to customer queries more quickly and more effectively. This enhanced communication, improved customer satisfaction levels and boosted retention rates. As a direct result, this company managed to grow revenue from existing clients by 12.5% thereby increasing their revenue by £300k.

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The more you know about your customers, the better you can serve them. Workbooks provides easily accessible systems that encourage client communication. The results in terms of customer satisfaction and increased revenue for this client speak for themselves!

John Cheney
CEO, Workbooks

DISTRIBUTION BUSINESS

This client in the distribution industry was suffering from a high degree of customer churn. They calculated that if they were able to improve their customer retention, not only would they be able to save £750k a year in lost revenue, they would also grow the revenue from their existing client base by 10%, thereby gaining £3.2million a year.

They succeeded in achieving these ambitious goals thanks to the introduction of Workbooks CRM systems that were able to measure customer satisfaction and improve the quality of their customer services.

Thanks to Workbooks, they were able to target marketing campaigns far more effectively and use higher customer satisfaction levels as a powerful cross-selling tool. They could also identify customers who were 'at risk' of leaving and put suitable client-care plans into action to retain them.

“Workbooks provides companies with a powerful set of tools – as our work for this distribution firm clearly demonstrates. Customer satisfaction is essential for repeat business and by focussing on your clients' needs, we can help you achieve great results.”

Alison Jones
Sales Manager, Workbooks

BETTER CUSTOMER EXPERIENCE

Case Studies

COELIAC UK

This UK charity supports people who suffer from coeliac disease and all those who follow a gluten-free diet. Workbooks CRM enabled Coeliac UK to provide its 65,000 members with a more intuitive and personalised experience as they can now easily sign up online, pay for and renew membership, review purchases and receive a greater amount of focussed and relevant member-related information.

As part of a total ICT overhaul, Director at Coeliac UK, Brendan Harris and his team reviewed 26 CRM systems, and after inviting ten to tender for the project. Workbooks was ultimately selected as it allowed the organisation to better segment its member records, record information in a more agile way and adapt to market changes.

The introduction of this effective CRM platform has been the foundation of the continued success of Coeliac UK. Now, virtually everyone in the business, from the chief executive to the membership manager, uses Workbooks every day, and every department – including the fund-raising, marketing and finance teams – has benefitted enormously from its use.

“Workbooks was the only solution that could handle the complexity of managing relationships with members, customers and suppliers, while presenting a simple logical interface to the users in each team. Not all solutions were as easy to use as Workbooks, so we ran tests across the different departments and it became clear that Workbooks was the one that our people actually preferred.”

The database handles over a quarter of a million contacts with 270 fields on a person record, 300 fields on an activity record and 15 types of person view, and more than 100,000 transactions per year. Workbooks allows Coeliac UK to punch far above its weight!”

Brendan Harris
Director of ICT, Coeliac UK

ENVIRONMENTAL SERVICES COMPANY

By engaging with Workbooks, this Environmental Services firm was able to create a 360-degree view of their customers by having all client interactions easy to view within one simple yet comprehensive system.

This gave them a much better understanding of how their customers were using their particular services and also indicated what additional environmental services might appeal to those same customers.

The Workbooks CRM platform also allowed them to track customer feedback, enabling them to recognise both ‘happy’ and ‘not so happy’ customers, who they could then focus on to enhance their experience.

“The carefully planned introduction of our Workbooks CRM platform enabled this client to achieve higher customer retention levels while also promoting complementary services that enhanced their customers’ levels of satisfaction.”

John Cheney
CEO, Workbooks



Better Decision Making & More Informed Insights

A clear benefit of operating a Workbooks CRM platform – which links sales, marketing, finance and many other functions across your business – is that all your essential data is stored in one central place. And thanks to Workbooks' intuitive interface, informative dashboards and accurate reporting, your centralised data is highly accessible making it easy to extract insights and carry out meaningful analysis.

Having a central data resource where all the information is accurate and accessible means that management gets a single uninterrupted view of what's happening right across the company, while informed decision-making becomes so much quicker and easier.

Because there is no duplicated data, no anomalies and the information is fully up-to-date in real-time, you don't have multiple versions of the truth. Which means, executives don't have to check reports once, twice, three times to ensure they are correct, because they know the data is accurate.

Your salespeople can keep pipeline data up to date, so you can see hot, warm and cold leads at a glance. Your marketing team can send out an email campaign and you can immediately see the level of engagement with that campaign. You also gain detailed insight into the performance of your sales team, including who's performing and who isn't.

Once you have all that information to hand, you can act on it. Find out why a salesperson is struggling to convert leads – they might need extra training – or why a direct marketing campaign didn't gain as much traction as expected – perhaps the campaign was targeting clients at the wrong time of the year for their budget decision-making process etc.

BETTER DECISION MAKING

Case Studies

The ability of Workbooks CRM to centralise a company's essential data and present that information simply and clearly, enabled these clients to gain rapid insights and engage in quicker and smarter marketing and sales decisions.

ASPIN

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 let retailers place orders 24/7.

Prior to the introduction 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 which often meant that access to data could be delayed or severely limited in application.

Aspin wanted a system that could provide a holistic view of all interactions with a customer including notes, activities, meetings, marketing, quotes, orders and invoicing. They wanted a web-based solution so that staff could see all customer interactions whether they were in the office or on the road. Workbooks delivered on all counts.

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My business has become more predictable. I make informed decisions and I prioritise better. I am back in control.

Nathan Aspin
Managing Director, Aspin

CARPET BUSINESS

This wholesale and retail carpet company needed to improve communication between head office, carpet fitters and customers. It also wanted better integration of its processes and data. Being able to track this intelligence enabled the company to improve its decision-making and provide more accurate estimates for jobs.

Additionally, being able to link its website and online retail business to its Workbooks CRM platform meant the team increased carpet order conversions from 30% to 50%. This was due to improved management information and the ability to act on the intelligence the system gathered and presented so clearly.

“Once you have Workbooks working for you and you have access to all the right data at the right time, the business of conveying accurate information and making rapid and effective sales and marketing decisions becomes so much easier.”

James Kay,
CTO, Workbooks

BETTER DECISION MAKING

Case Studies

ULTIMA MEDIA

Ultima Media is a global B2B publishing and events business that serves the automotive industry. Through magazines, websites and events it aims to inform every part of the auto industry from vehicle makers to parts suppliers, service centres, software developers and equipment providers.

After asking for recommendations and researching solutions, Ultima Media chose Workbooks CRM as it stood out as offering a good return on investment, could easily be customised to their business needs, and the Workbooks team could clearly help and advise on the best business practices and processes to suit Ultima Media's organisation.

Prior to the implementation of Workbooks, Ultima Media had no clear visibility of their data and were simply unable to make any decisions based on it. As they couldn't clean or organise their data it was difficult to extract meaningful reports, while building marketing campaigns was time and labour intensive.

Thanks to Workbooks this frustrating situation has been successfully reversed and Ultima Media can now mine their data and use it as a powerful marketing and sales resource.

“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.”

Gavin Miller
Managing Director, Ultima Media



BETTER DECISION MAKING

Case Studies

KNOWLEDGE TRANSFER NETWORK

KTN is the Knowledge Transfer Network that works closely with the UK government. This organisation promotes innovation transfer through its Innovation Exchange programme, matching real industry challenges to companies and innovators already working on solutions.

Success at KTN is based on its unique cross-sector approach which taps into a wide network of expertise, connecting people and organisations to help accelerate ideas and solve problems across numerous sectors from defence and energy to agriculture and health.

However, managing the huge network of relationships, insights and data that is critical to KTN was becoming impossible. They urgently needed a CRM system that was easy for their team to use, tailored to their own processes and able to provide the deep insights that would lead to the successful sharing of information. That's why they chose the Workbooks CRM platform to support all their activities.

“We're very happy with the way it's worked. It's about bringing the right people together to deliver outcomes that benefit the UK economy and we know we can do things better as a consequence of the implementation of Workbooks.”

“The capturing of who people are and what they do is key, you can't really do that unless you have a CRM system like Workbooks.”

Ian MacGregor
Director, Knowledge Transfer Network

DATASOUND LABORATORIES

Datasound Laboratories (DSL) designs and manufactures printed circuit board (PCB) products including touch screen and toughened panel solutions. These products are used across a wide range of industrial environments including food, pharmaceuticals and packaging production which require computing solutions that meet the rigorous demands of industrial environments.

When Rory Dear joined DSL as Managing Director, he quickly identified several areas for improvement including the need for an effective CRM platform. He had previously found it extremely restrictive having to rely on Excel sheets and then make important decisions based on incomplete and out of date data. Then he discovered how Workbooks offered the ideal combination of data depth and easy accessibility.

Today DSL have instant access to a level of data they hadn't thought possible. **“You could tell me any product in this company and I could tell you what percentage failure rate we've had over the past two years. You could tell me a serial number and I can tell you which order it came from, which invoice it came from, who it was sold to, how it got there. I can see that from anywhere in the world. I can understand who's performing well and who isn't performing well perhaps, I can understand which quotations are out of expiry, I get a full picture of the business.”**

“What we have today is instant access to all of the data we could ever dream of. We had our most successful year ever by a factor of 30% but we weren't any busier as a result, which is really interesting. The fact we'd streamlined our processes so much actually meant there was no noticeable change to the amount of resource required to fulfil 30% more orders!”

Rory Dear
Managing Director, Datasound Laboratories

We Make Workbooks Work For You

Workbooks is so much more than a powerful and adaptable CRM platform: we're also a strong team of highly experienced CRM consultants who work alongside you to ensure that Workbooks works for you.

Workbooks is so much more than a powerful and adaptable CRM platform: we're also a strong team of highly experienced CRM consultants who work alongside you to ensure that Workbooks works for you.

We offer long-term involvement from initial in-depth analysis through to full implementation. Our role includes any necessary adaptation of the Workbooks CRM platform to meet your specific needs – together with practical training and ongoing consultancy.

Plus we don't allow our clients to become complacent. We continue to challenge them to make even greater use of Workbooks to drive their future marketing and sales success.

Our expert team implements the Workbooks system on your behalf and trains you and your staff how to use it to best effect whatever your company's goals and objectives. For example: to grow revenue, increase leads, retain customers, achieve greater upselling and cross-selling.

Over the months and years ahead, we aim to make sure our customers gain as much as possible from their Workbooks platform.

Many of the companies that have achieved great results with Workbooks CRM have taken part in our two-day **[Shared Success Workshop](#)**.

This is a low-cost exploration of what your company needs and what can be achieved when you partner with Workbooks.

Our **[Shared Success Workshop](#)** involves an in-depth analysis of your current working practices plus tailored recommendations as to how Workbooks CRM can be successfully incorporated into your sales, marketing and support activities.

[SIGN UP FOR SHARED SUCCESS](#)