

## Case Study

# SPOTLER

## Switching from Microsoft Dynamics



**spotler**

We're getting more functionality for less than we were previously spending. The data is more logically organised and we find it's much easier to get it out of the system so we can use it in our reporting and day-to-day queries.

**CHRIS ROYALL**

Spotler Operations Director

## INTRO

SpotlerUK was launched – initially as CommuniGator – in 2005 with the aim of improving marketing automation. Powered by AI, SpotlerUK is a leading marketing automation and lead generation software provider.

Spotler offers an all-in-one inbound and outbound platform that includes email, social media, IP lookup, web forms, landing pages, popups and more. The platform enables marketing and sales teams to run complete marketing campaigns, convert more traffic and generate more leads.



**Save money on licence fees**



**Improve account management processes**



**Increase customer engagement**

# TIME TO SWITCH TO A NEW SYSTEM

The shift to Workbooks was prompted in Autumn 2019 when Microsoft increased the price of Dynamics 365. "We already know the value CRM brings to Spotler," says Lee Chadwick, CEO of SpotlerUK. "But we are always conscious of the return on investment, we have quite complex CRM processes and Workbooks have more than proved that they can deliver."

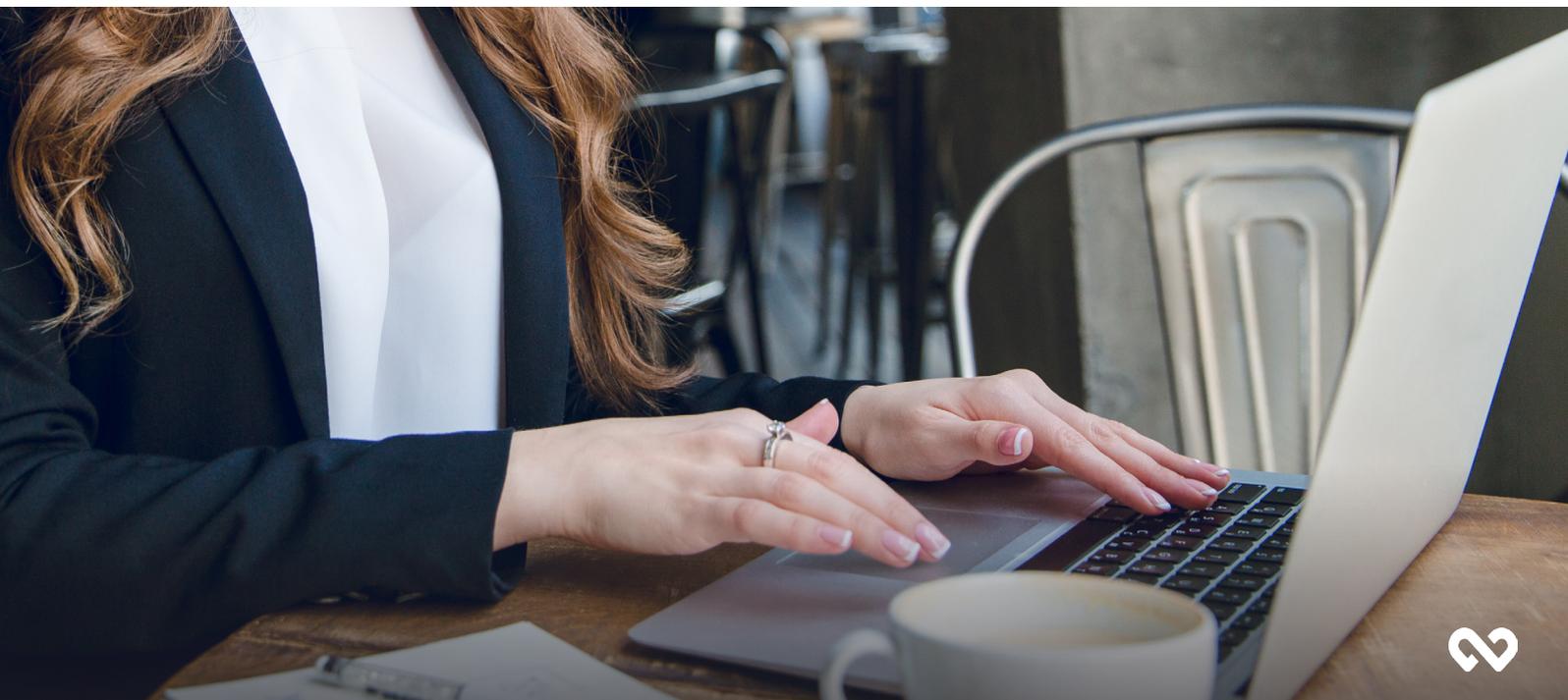
With complex CRM projects it is important to define what success looks like, which can vary hugely from company to company. Workbooks' Shared Success workshop gave all stakeholders in the Spotler CRM project a chance to voice their opinions and engage in the project.

The session revealed a number of 'must have' requirements, which boiled down to wanting to reduce costs and improve business visibility. Spotler also wanted to take this opportunity to improve their customer engagement and account management processes, using Workbooks in ways that simply weren't possible with Dynamics 365.



Spotler is where sales and marketing come together in one place. From marketing automation right through to lead generation we have a range of products and services that can transform an organisation. We needed our CRM to help us reach a far wider range of people than we had done so far. If we could have those conversations we could change how people see Spotler, and open up exciting new opportunities.

**SIMON MOSS**  
Spotler Marketing Director



# IMPLEMENTATION SUCCESS

In the run-up to the go-live date in February 2020, the Spotler team received admin and reporting training from Workbooks as well onsite training, and this formed a foundation for a successful deployment that produced early wins.

Data migration can be a challenging element when switching to a new CRM solution, and with a complex system already in place it was important that all data could be migrated effectively and mapped correctly in the new solution.

This led to the Workbooks team creating custom fields to accommodate Spotler's specific data requirements. This helped the Spotler team format their data and map it across to the Workbooks platform, leaving any bad data behind and ensuring only clean useful data made it into the new system.

# CUSTOMER SUPPORT REIMAGINED

One of the instant successes with Workbooks has been Spotler's brand new customer portal, which allows customers to easily raise support cases to be dealt with by the Spotler customer support team, as well as make suggestions for the product roadmap.



The Customer Portal has been a major success. Customers can log in, create their own tickets and then the system prioritises tickets, optimising the entire workflow. Customers really love the fact they have control of it themselves, and it's enabled us to deliver faster, better service to customers.

**STEPHANIE KENT**

**Spotler Customer Services Director**

This focus on customer support gave Spotler the chance to improve their account management processes, which reduced their customer churn. By being able to see clients' issues in real time, Spotler could deal with them much more quickly and uncover opportunities to cross sell and upsell their marketing automation suite.



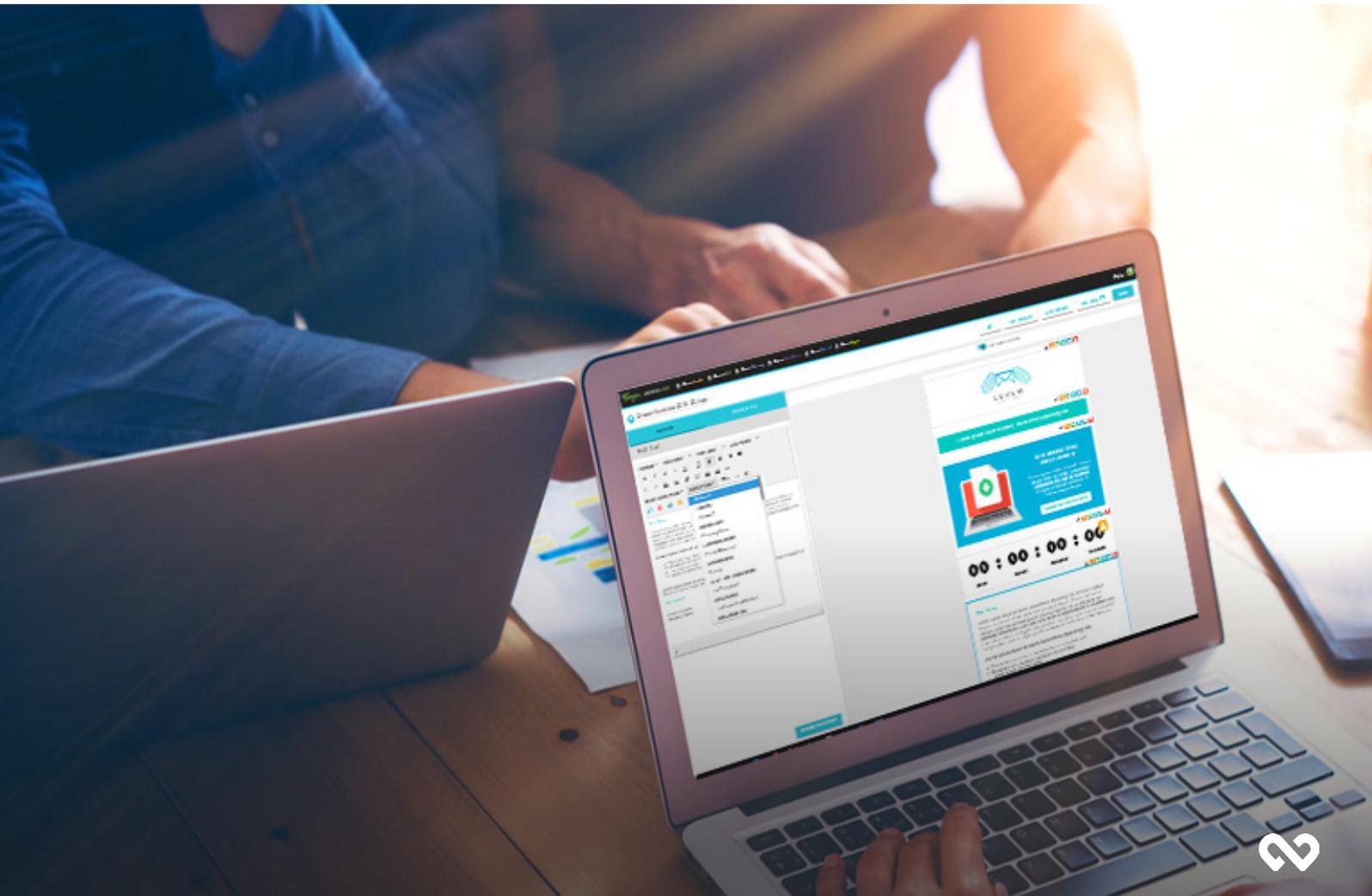
# SALES AND MARKETING BETTER ALIGNED

The Shared Success workshop also uncovered a need for better pipeline management, from marketing all the way through to sales order processing.

Workbooks enabled the marketing team to segment customers for better targeting, and easier reporting on all their marketing metrics in one place.

Improved pipeline management has allowed the sales team to track leads and opportunities as they are qualified and converted into closed deals.

The next step in Spotler's new CRM journey is to implement better sales order processing so they can make this as quick and as seamless as possible for both their customers and sales team.



# CRM IS A JOURNEY

Looking ahead, Spotler plans to add order processing and an integration with Xero, as well as automating communications around contract renewals. Lee Chadwick, Spotler's CEO sees this as hugely beneficial for the partnership between Spotler and Workbooks.



Now we're both using each other's systems we'll be able to provide even greater value to our customers. We'll be able to show firsthand how we migrated from Dynamics, improving almost every aspect of how we work whilst saving on licence costs. There are many organisations who'll be interested in doing the same.

**LEE CHADWICK**  
Spotler CEO

John Cheney, Workbooks' CEO agrees. "Choosing a CRM solution from the world's leading software company might seem like the obvious choice," he says. "But a growing number of organisations are looking beyond the obvious."

He concludes: "They're realising that Dynamics is four times more expensive than Workbooks CRM Edition, it's complex to implement, and it doesn't always deliver what an organisation needs. It's now the CRM we most commonly replace at Workbooks."

## ABOUT

### INDUSTRY

Software Vendor

### NUMBER OF EMPLOYEES

100

### IMPLEMENTATION DATE

February 2020

### TECHNOLOGY

- Workbooks CRM Pro
- Workbooks Outlook Add-in
- Workbooks Mapping Module
- Spotler Marketing Automation Suite

