

# Seymour Taylor selects Workbooks CRM to strengthen growth

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Tuesday, 3 August 2021

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Workbooks (<http://www.workbooks.com>) announces that Seymour Taylor (<http://www.stca.co.uk>), one of the longest-established accountancy practices and business advisers in the Thames Valley, has chosen Workbooks CRM to help grow revenues and increase operational efficiency throughout the business.

As part of The Hampden Group (<http://www.hampden.co.uk>), a leading provider of specialist insurance, investment and financial support services, Seymour Taylor provides a complete range of accountancy, taxation and related financial services.

With an established practice management system to handle client relationships, Marketing Manager Suzanne Curry, identified a requirement to improve the generation and tracking of new client leads. With lead processing based on a collection of spreadsheets, Curry recognised there were issues ensuring a timely response to new leads, identifying key prospects to chase, tracking follow-up activities and visibility of the new business pipeline.

“The current process is not as efficient as it could be and the time spent in between reports and meetings doesn’t always give us an up-to-date view of the sales pipeline available for our business to progress,” said Curry. “This can lead to opportunities for new work being missed.”

The company had invested in a website upgrade and MailChimp email marketing to promote a series of informative webinars, but there was an opportunity to increase the quality and quantity of sales leads being generated.

“Ideally, we were looking for an integrated solution to help us promote our events and other content, measure the success of our campaigns by tracking opens, clicks and website visits, and allocate leads to the team for immediate follow-up,” confirmed Curry.

With a good understanding of their requirements, the marketing team quickly identified a number of popular products for consideration, but on closer analysis found very few suppliers capable of providing a seamless solution on one platform at an affordable price.

“The products identified by online research and recommended by our peers could offer good point solutions, but we felt that the complete solution proposed by Workbooks and their marketing automation partner, Spotler was the best fit for our business,” said Joanne Kingsnorth, the Director responsible for new business. “We wanted to work with a partner with good experience in our sector who could help us to develop an effective sales and marketing process for our business.”

Workbooks is unique amongst CRM vendors by supporting customers throughout the entire implementation process, ensuring customers achieve their desired outcomes and the CRM delivers value with good user adoption. For businesses that are new to CRM, the Jumpstart implementation approach is a quick, easy and cost-effective way to get up and running with a set of pre-defined sales and marketing processes based on best practice and (optional) free implementation services, including data import and user training.

“With Workbooks’ help, we’re looking forward to making significant improvements in the coming weeks and months,” confirmed Kingsnorth. “The combination of integrated email marketing, greater visibility of interactions on our website, lead management and engagement monitoring, with a best practice solution and some free implementation services, made Workbooks a very compelling solution.”

“We are very proud to be selected by Seymour Taylor,” said John Cheney, CEO at Workbooks. “Our Jumpstart approach is delivering successful implementations for many businesses adopting CRM for the first time, and we’re looking forward to a successful long-term partnership with the team at Seymour Taylor.”

#### About Seymour Taylor

Founded in High Wycombe in 1917, Seymour Taylor is one of the longest established firms of Accountants and Business Advisers in the Thames Valley, and provides a complete range of accountancy, taxation and related financial services.

Seymour Taylor is a member of MGI Worldwide, an international network of independent auditing, accounting and consulting firms, with presence in over 80 countries across all continents. This allows us to provide the most up to date business accountancy and taxation advice to our clients.

Seymour Taylor is part of The Hampden Group.

For more information, visit [www.stca.co.uk](http://www.stca.co.uk) (<http://www.stca.co.uk>) and [www.hampden.co.uk](http://www.hampden.co.uk) (<http://www.hampden.co.uk>).

#### About Workbooks

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Workbooks extends beyond sales, marketing and customer support to include order management and fulfilment, invoicing and supplier management, at a price which is typically 50-70% less than solutions such as Salesforce or Microsoft Dynamics.

Workbooks joins up the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360 view of customers and the information is accessible anytime, anywhere. Productivity is increased, operations are streamlined, insightful decisions are made and the business is better equipped to differentiate against the competition.

For more information, visit [www.workbooks.com](http://www.workbooks.com) (<http://www.workbooks.com>).

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