

Bishops Printers invests in CRM from Workbooks

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Thursday 8th June 2017, London UK: Bishops Printers Ltd, a Portsmouth-based commercial print firm, has invested in a CRM solution from Workbooks Online Limited (<http://www.workbooks.com>), the UK-based leading vendor.

“This is an exciting step forward for our company,” says Leon Windsor, General Sales Manager at Bishops Printers (<http://bishops.co.uk>). “We are a bespoke manufacturer with exciting growth plans, and are already seeing the positive effects of Workbooks on our business. In the months and years ahead, as we roll out further functionality of Workbooks we are confident it will make an ever greater contribution to our growth plans.”

IT investments

Windsor joined Bishops in early 2016 to head up the sales team and improve its effectiveness. He very quickly realised that the team was struggling with an out-of-date CRM platform from Act!. The system he inherited was used only for logging callbacks and notes – it was little more than an electronic diary – but the team needed more.

“ACT! was limiting our ability to grow, and is simply not fit for purpose,” he explains. “In my previous role we’d had a good CRM system and I needed to bring something similar to Bishops.”

“The firm is no stranger to investing for growth,” he added, “Having recently invested £3m in the factory, but until now our investments have mainly been on the production side. Our CRM system was outdated and unsupported, and it was clear we needed to find a new solution.”

A simple choice

The first stage in the procurement process was mapping out the required functionality. The new CRM solution would need to have all the basic activity and pipeline features that were familiar to staff currently using ACT!, but have a richer feature set and wider functionality to provide a solution that would benefit the whole company, through a carefully phased implementation approach. In addition to improving the sales process, the new solution would need to allow the marketing team to easily segment customer lists and integrate with email marketing tools, integrate with the phone system to track call activity, and with the finance system so salespeople could see a customer’s credit limits, history and current balance.

With a clear understanding of the company’s requirements, Windsor quickly established a shortlist of three CRM vendors to consider. The list included reviewing an upgrade of the existing Act! database, assessing the likely cost of enterprise vendor, Salesforce, and checking out a wild card that Windsor had met at the Marketing Week Live exhibition, Workbooks.

“We looked at all three, assessing how easy they would be to use, how well they would allow us to manage our activities, track quotes and report on our sales pipeline, and ultimately what sort of return

on investment we could expect. Measured on those criteria it was in fact a very simple choice as Workbooks delivered in all areas, and so we went with them.”

Taking performance to a new level

The implementation went live on 1st February 2017, and 45 members of the sales and marketing team at Bishops Printers are now using Workbooks, including new business telesales, internal account management and field sales.

Windsor reports that Workbooks is already taking the performance of his sales team to a new level. “We are becoming a sales-focused business for the first time,” he says. “Workbooks allows my team to quickly schedule customer call-backs and store all activity records, including emails, in one, easily accessible place.”

While this functionality is revolutionising the organisation, Windsor is also using Workbooks to gain insight into campaign and team performance, which in turn is enhancing his decision-making ability. “I can see which customers the team is not talking to and monitor quotes that are not being followed-up, I can easily reallocate customers when a member of the sales team leaves, and I can segment campaigns in a way that was previously impossible,” he says.

Central hub emerging

But this is just the beginning. Very soon the firm will be integrating Workbooks with its Optimus ERP system so that information on quotes and project status is synchronised and visible to the entire sales, marketing and management team for activity tracking and detailed sales analysis. Next steps include capturing emails sent via Outlook, and integration with a range of marketing tools including Mailchimp.

Windsor is excited by the possibilities ahead as Workbooks becomes a central hub for the business’s data and processes. “This is just the start of a journey,” he says. “We started off by addressing the most critical parts of our sales processes, but as we grow in confidence and learn more about Workbooks, we’re realising there is so much more we can do. For example, our system for recording errors on jobs is paper-based, which makes it difficult to track whether we re-did the job or refunded the customer. Moving this process to Workbooks will save a significant amount of time, eliminate the risk of human error, and make the whole process far more efficient. This functionality is already in Workbooks so we just need to switch it on.”

Exciting future

“Over the past 32 years Bishops has built an enviable reputation for high quality work, and has established outstanding relationships with its customers,” concludes Windsor. “We’re a traditional business that is learning day-by-day how technology can allow us to do it all more efficiently, so we can build upon that reputation and strengthen those relationships. Workbooks is helping us take our business to a whole new level.”

About Workbooks

Workbooks delivers cloud-based CRM and business 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

PR Contact:

Christelle Fraysse

christelle.fraysse@workbooks.com

+44 (0)118 3030100