

# Shutterly Fabulous selects Workbooks CRM to enable growth

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30th November 2017, Reading, UK: Workbooks announces that Shutterly Fabulous Ltd, the UK's leading window shutter experts, has chosen Workbooks CRM to help grow revenues and increase operational efficiency throughout the business.

Part of the TCMM Shutters Group along with California Shutters, The Shutter Store and DIY Shutters, Shutterly Fabulous (<http://www.shutterlyfabulous.com>) is a specialist UK shutters company based in Brighton, dedicated to quality products and quality service. With a nationwide team of consultants, whose role is to visit the customer and explain every aspect of the design and options available, the company provides expert advice to ensure customers choose the best shutter design for their home.

"We identified an opportunity to significantly increase our win rate from customer appointments," said Colin Williams, Head of Sales at TCMM. "We want to give our inside sales team the ability to select the best available consultant for an appointment as well as proactively create campaigns to support these opportunities. In addition, we want to give our sales consultants the ability to create an accurate quotation during the in-house visit, allowing customers to confirm their order and pay a deposit there and then. The objective is to improve opportunity conversion rates by giving our consultants the tools to conclude a sale during the appointment, at the same time eliminating the current manual processing of quotations and orders. We estimate this will help us generate an additional £1m in annual revenue".

Whilst evaluating CRM suppliers including, amongst others, Salesforce and Zoho, TCMM was particularly impressed by the Shared Success approach proposed by Workbooks (<http://www.workbooks.com>). The approach is simple: co-fund a strategic CRM workshop that brings together operational and executive stakeholders to identify how CRM can benefit the business and define success criteria. The output is a detailed report that identifies high-level business outcomes and specific CRM requirements, a CRM project roadmap with resource requirements, and a proposed budget.

"Inviting experienced consultants to review our processes was a hugely valuable exercise, and the Shared Success Workshop allowed us to cost-effectively identify how the right CRM solution would improve our sales execution," said Sam Tamlyn, General Manager at TCMM. "We also identified significant opportunities to improve operational efficiency, and now have a roadmap that allows us to prioritise investments in the coming years."

Capturing and confirming the detailed shutter design during an appointment, and then sharing the information instantly in Workbooks CRM, will allow TCMM to process orders much more efficiently.

"The ability to capture the shutter design in Workbooks CRM, and then produce a detailed quotation that can be emailed to the customer for immediate approval, is a significant improvement in our sales process," said Tamlyn. "The order processing efficiencies could be worth around £100k in cost savings, and the ability to easily produce a report with commission calculations for our self-employed sales agents will save us at least three days a month. We have huge potential to tap into and I am confident that Workbooks will ensure we achieve our objectives."

As a B2C organisation, TCMM stores and processes personal consumer data, and as such, is getting ready

for the General Data Protection Regulations (GDPR) that come into force in May 2018. TCMM plans to leverage Workbooks' marketing automation tools to generate new sales opportunities from existing customer data, and use the new Workbooks Compliance Record to track consent.

"The combination of easy data segmentation, sophisticated email marketing and website visitor tracking will allow us to fully utilise our historical records and provide a better service to our customers," said Williams. "And this will also help us comply with the new GDPR legislation."

"We are very proud to be selected by TCMM Shutter Group following a thorough analysis of their needs," said John Cheney, CEO at Workbooks. "As a result of the workshop approach we have a shared vision of the required business outcomes and the success criteria against which we will be measured. We're looking forward to a successful long-term partnership with the team at Shutterly Fabulous."

#### About Shutterly Fabulous

Shutterly Fabulous is an independent plantation shutters company based in Brighton, installing shutters throughout London and nationwide. Being among the UK's most established shutters companies, we stand out from the crowd with our unique products and our passion for designing, manufacturing and installing customer's shutters with care and attention to detail.

With our entire nationwide team working exclusively for Shutterly Fabulous, your shutters are installed by a true and highly trained professional. With a wealth of different designs available for your wood shutters, it's important you have an expert help you choose the best design for your home.

Thanks to our direct manufacturing relationship, you'll be pleasantly surprised at just how cost effectively you can achieve a Shutterly Fabulous home.

Shutterly Fabulous is part of the TCMM Shutters Group.

For more information, visit [www.shutterlyfabulous.com](http://www.shutterlyfabulous.com).

#### 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).

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