

# TC Facilities Management used Workbooks to win its biggest financial customer

Submitted by: Workbooks Online

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Workbooks (<http://www.workbooks.com>), a British cloud-based Customer Relationship Management (CRM) and marketing automation vendor, unveils how its platform helped TC Facilities Management (TCFM) (<https://www.tcfm.co.uk/>) to win its biggest financial customer.

The problem – identifying and pitching to a major new customer

TCFM had been using Workbooks to manage their CRM

(<https://www.workbooks.com/resource-documents/tc-facilities-management-case-study/>) for more than four years, with demonstrable success. But with a big business pitch coming up, worth £10-15m, Marketing Manager Fiona Ellingham knew they needed an edge.

“We were already using Workbooks to manage our CRM and for our helpdesk. It had transformed the way we could serve our customers but we were aware that it could do a lot more. We’d started to use it for lead generation too, helping to identify warm leads from specific sectors.

“Workbooks’ reporting dashboards mean we can see which companies have been engaging with our website and which areas they’ve been most engaged with. We can also see which sectors are most engaged and target our marketing activity accordingly.”

The solution – Workbooks CRM with mapping module and real-time helpdesk support

Fiona Ellingham explains: “We used Workbooks’ mapping module to match the customer’s more than 600 branches around the country with the geolocations of our own resources to work out potential costs and identify any areas where we might need to increase our presence. And when one of the customer’s teams asked us for a map of the confirmed sites, we were able to send it to them straight away.

“Workbooks has also allowed us to expand our helpdesk offering and create a service that’s completely aligned to the needs of our customers. After first trialing the system a couple of years ago, we were impressed at how it was able to log issues and provide real-time information to help our colleagues be more efficient. The beauty with the workbooks system is that it can be configured to our precise business needs rather than having to fit our process around what the system can do. The new system provides our support staff with everything they need on one screen, and we’ve now rolled it out across all our customers and used it for our recently relaunched IT helpdesk too.”

“And when we eventually won the contract in October 2018, we used Workbooks’ automated email facility to send out a range of internal comms, including video, to spread the good news. This led to a three times higher click rate than we’d been getting previously and helped to create a sense of celebration and excitement in the business.”

The results – contract won and increasing efficiencies

General efficiencies engendered by Workbooks, including identifying new leads and targeting their needs, helped TCFM distinguish themselves when pitching to their latest major customer. Specific efficiencies focused on the requirements for the customer such as mapping resources to the customer’s hundreds of sites around the country helped TCFM win the pitch. In addition, Workbooks has transformed their helpdesk service, greatly improving their offering to customers, and continues to assist with lead generation and CRM.

## About TCFM

TC Facilities Management has been providing facilities management services, including cleaning and security, to many of the UK's most well-known retailers, manufacturers, property firms, and other corporates, for more than 55 years. Headquartered in Tadworth, Surrey, it currently operates in more than 5,500 locations around the UK.

## About Workbooks

Workbooks delivers cloud-based CRM and Marketing Automation applications to the mid-market, at an affordable price. Its services extend 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 alternatives such as Salesforce or Microsoft Dynamics.

Workbooks unites the entire organisation around data and processes, promoting teamwork and collaboration. It provides a single 360-degree view of customers and the information is accessible anytime, anywhere. Productivity increases, operations streamlined, insightful decisions 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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