

## Customer: Ways2Win Limited

*A complete customer relationship and business management solution*

### About Ways2Win

Ways2Win write quality tender documents for winning you that contract – with a specialist interest in public sector procurement. Bid management, tender evaluation, tender training and tender management all come naturally to them. The small team is based in Exeter in Devon and led by Wendy Wills. Ways2Win focuses exclusively on what it does best - delivering a full service to help businesses win contracts for their business growth.

### Requirements and Challenges

**Awareness and Visibility:** Keeping track of the day to day communication with each customer is a key challenge for W2W. Who said what to whom and when, sharing email communication amongst the team, keeping track of time spent on each project and making sure quotes and invoices are created easily and sent out on time.

**Effective Processes:** Additionally, W2W is all about attention to detail and quality responses and therefore their internal systems need to be up to scratch. Messages sent out from the team need to be consistently formatted and branded, keeping track of time across customer projects must be recorded simply and paperwork such as raising invoices needs to be produced swiftly with little effort.

**Greater Sales Reach:** The sales team at W2W are active networkers and marketers and need to keep in regular contact with their target audience and target markets. A system was needed to hold details of the people they are targeting and a facility to send personalised mass (e)mail, track leads through the various steps in a sales cycle and easily 'convert' them to customers when business was secured.

### Solution

W2W consulted with IT specialist, Bluegrass IT, who recommended specialist CRM provider, South West ICT. After an initial consultation, SWICT recommended the info@hand CRBM solution because of the breadth of functionality required and easy to use interface.

Info@hand CRBM is a web-based sales, marketing and customer service solution offering the following core features:

- Centralised database of contacts

*"Email marketing*

*Sales tracking*

*Quoting & Invoice  
production*

*Project management*

*Contract management*

*MS Outlook  
synchronization*

*Integrated  
on-line shopping"*

- An email marketing component to target and keep track of results
- A products and services catalogue
- A quoting and invoicing solution
- A project management solution to keep track of customer delivery projects
- A time recording and tracking solution linked to invoicing

Bluegrass IT set up a Windows Server in the W2W offices and SWICT installed the info@hand CRBM software. Having all features together in one solution improved visibility of all customer communication and helped streamline the business.

### Microsoft Outlook integration

The info@hand CRBM system also integrates with Microsoft Outlook email and calendar. Whenever an email arrives in a user's Inbox, it is just one click away from being added to the database together with all attachments. This means that all staff have instant visibility when viewing the related contact record.

### Website integration based on the Joomla! Content Management system

Joomla! is the World's leading Open Source Content Management solution and info@hand CRBM includes an out-of-the-box 'component' for Joomla!. This means that W2W's events and online bookings are captured in their CRM system which in turn processes the invoices and keeps the contact information for further communication and marketing.

### Results

Within days of the implementation the team began to see the operational benefits of a centralized solution. This began with a new sales campaign to generate bookings for a training course. W2W targeted businesses in the Devon region. A campaign was set up in info@hand and a target list of 4,000 email addresses was purchased and imported. An info@hand email template was created and sent out to all 4,000 people. Within 24 hours of the emails being sent, W2W received bookings for their event and the sales team received a list of 'warm' leads consisting of people that had downloaded information and followed links from within the email.

### About South West ICT

South West ICT Limited is based in Cornwall, United Kingdom and provides software and services to businesses across the UK. Specializing in Customer Relationship Management (CRM) software built on the Open Source platform, South West ICT deliver innovative and cost effective sales, marketing and customer service solutions that interact with a businesses website and finance system.

